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Microsoft 365 Copilot & Agents Training (AB-730)

formerly MS-900

1 day (7 hours)

Overview

Our Microsoft 365 Copilot & Agents training course—AB-730 Certification Preparation—will enable you to use artificial intelligence in your professional activities to create content, analyze information, collaborate, and increase efficiency.

During this training, you'll discover how Microsoft 365 Copilot works and learn how to write effective prompts, select relevant sources, and verify the quality of the responses you receive. You'll put Copilot to use in Word, Excel, PowerPoint, Outlook, and Teams to draft documents, prepare presentations, analyze data, manage your communications, and facilitate your meetings.

You'll also learn how to create and test your first no-code business agent using Agent Builder in Microsoft 365 Copilot. The program also covers the responsible use of AI, the impact of permissions, the protection of sensitive information, and the role of Microsoft Purview.

Upon completion of this training, you will be able to use Copilot and agents in real-world business scenarios and continue preparing to take the AB-730 – AI Business Professional exam, in accordance with the syllabus applicable to your exam session.

Like all our training courses, this one will introduce you to **the latest stable version** of the technology and its new features.

Objectives

- Understand the capabilities and limitations of Microsoft 365 Copilot and agents

- Write, refine, and reuse effective prompts tailored to your business needs
- Create and improve documents, presentations, and communications with Copilot in Microsoft 365 applications
- Analyze data and conduct in-depth research with Excel, Analyst, and Researcher
- Facilitate meetings and collaboration with Teams, Facilitator, Copilot Pages, and Notebooks
- Choose the right agent, create your first no-code business agent, and explore task delegation with Copilot Cowork
- Verify the generated results and apply best practices for data protection and responsible use of AI
- Prepare to take the AB-730 exam – AI Business Professional

Target Audience

- Microsoft 365 users who want to integrate Copilot into their daily work
- Employees in sales, marketing, human resources, finance, and support roles
- Managers, team leaders, and project managers
- Business analysts, consultants, and professionals who create or use information

Prerequisites

- Have a basic understanding of the Microsoft 365 environment
- Be comfortable with common uses of Word, Excel, PowerPoint, Outlook, and Teams
- No prior experience with Microsoft 365 Copilot or programming skills is required
- For workshops, have access to a training environment with the appropriate licenses, features, and permissions

Curriculum for our Microsoft 365 Copilot & Agents Training – Preparation for the AB-730 Certification

[Day 1 – Morning]

Understanding Microsoft 365 Copilot and Writing Effective Prompts

- Understand the principles of generative AI, its capabilities, and its limitations
- Distinguish between Copilot Chat, Copilot in Microsoft 365 apps, and agents based on business needs
- Identify access requirements and differences in functionality based on licenses and organizational settings
- Understand how documents, business data, and web sources influence Copilot's responses
- Discover the role of Microsoft Graph, Work IQ, and connectors in leveraging
- Build a prompt by specifying the objective, context, sources, and expected result

- Refine a request based on the responses received and choose the model when a selection is offered
- Save, share, and schedule prompts; understand the use of memory and custom instructions
- Hands-on workshop: transform vague business requests into actionable prompts, compare responses, and build a prompt library.

[Day 1 – Afternoon]

Create documents, presentations, and communications with Copilot

- Use Copilot in Word to write, rephrase, and structure a professional document
- Produce a summary or decision memo based on existing documents
- Use Copilot in PowerPoint to prepare a presentation based on a brief or a document
- Tailor content, tone, and visuals to the audience and the communication objective
- Use Copilot in Outlook to summarize exchanges and prepare tailored responses
- Reuse information across Word, PowerPoint, and Outlook within the same professional scenario
- Verify accuracy, clarity, and relevance of content before distribution
- Hands-on workshop: transforming a project file into an executive summary, presentation, and communication message.

[Day 2 – Morning]

Analyze data and conduct in-depth research with Copilot

- Prepare readable, structured data for use with AI
- Use Copilot in Excel to explore a table, get explanations, and identify trends
- Use the Analyst agent to analyze data files and generate tables or visualizations
- Formulate an analytical question by specifying metrics, the time period, and the expected comparisons
- Use the Researcher agent to delve deeper into a business question using multiple sources
- Define the scope of a search and review the sources cited in the report
- Verify calculations, assumptions, and conclusions before making a decision
- Hands-on workshop: Analyze business results with Analyst and supplement the conclusions with documented research using Researcher.

[Day 2 - Afternoon]

Collaborate with Teams, Facilitator, Copilot Pages, and Notebooks

- Use Copilot in Teams to prepare for a meeting and find useful information

- Take advantage of real-time transcription and smart summaries, depending on available features
- Use the Facilitator agent to streamline note-taking and highlight decisions and actions
- Create a Copilot Page from a response, then edit and share it to collaborate with others
- Create a Copilot Notebook that brings together sources and discussions relevant to a project
- Search the content in a notebook to generate a contextualized summary
- Find, rename, and delete conversations; organize relevant exchanges in a notebook
- Check sharing permissions for pages, notebooks, and associated documents
- Hands-on workshop: Lead a project meeting, consolidate the results in a collaborative Page, and organize sources in a Notebook.

[Day 3 - Morning]

Use agents and create your first business assistant

- Identify tasks for which an agent adds value
- Search for an agent in the Agent Store and choose between an existing agent and a custom agent
- Create your first no-code agent with Agent Builder in Microsoft 365 Copilot, based on a template or a business need
- Define instructions, knowledge sources, capabilities, and prompt suggestions
- Test the agent's responses and improve its behavior based on real-world scenarios
- Share the agent with a team, taking into account permissions on its sources
- Explore Copilot Cowork to delegate a multi-step task
- Understand the role of Cowork skills, distinguish between predefined and custom skills, and review the plan, progress, and results
- Manage scheduled tasks and identify limitations that require human intervention
- Hands-on workshop: Create and test a Q&A agent based on business documentation, then review a delegation scenario using Cowork.

[Day 3 - Afternoon]

Adopt responsible practices and prepare for the AB-730 exam

- Identify risks related to errors, fabricated information, prompt injection, and overreliance on responses
- Apply a verification method: consult sources, verify data, and have results validated sensitive results
- Understand how permissions and data protection rules influence Copilot's responses
- Recognize the risks of excessive sharing and adopt the right habits for handling confidential information
- Discover the role of Microsoft Purview, confidentiality labels, and data loss prevention
- Review the skills outlined in the AB-730 syllabus applicable to the exam date and language
- Solve business scenarios and practice questions, then explain your answer choices
- Identify areas for improvement and develop a personalized study plan

- Hands-on workshop: Evaluate a Copilot output containing errors or sensitive information, then complete an exam readiness assessment.

Target Audience

This training is intended for both individuals and companies—large or small—seeking to train their teams in new, advanced IT technology or to acquire specific business knowledge or modern methods.

Entry-Level Assessment

The pre-training assessment complies with Qualiopi quality standards. Upon final registration, the learner receives a self-assessment questionnaire that allows us to evaluate their estimated proficiency level across various types of technologies, as well as their expectations and personal goals for the upcoming training, within the limits imposed by the selected format. This questionnaire also allows us to anticipate certain connection or internal security issues within the company (intra-company or virtual classroom) that could pose challenges for monitoring and ensuring the smooth running of the training session.

Teaching Methods

Hands-On Training: 60% Practical, 40% Theoretical. Training materials distributed in digital format to all participants.

Organization

The course alternates between theoretical input from the instructor—supported by examples and reflection sessions—and group work.

Assessment

At the end of the session, a multiple-choice quiz is administered to verify that participants have successfully acquired the skills.

Certification

A certificate will be issued to each trainee who has completed the entire training program.