

# The Complete Copilot Master Certification Course

*From First Prompt to Certified Expert — Master Microsoft Copilot Across Every App and Workflow*

2026 EDITION

Copilot Master Certification (CMC) | 40 Hours of Instruction + Labs | Self-Paced / Instructor-Led / Hybrid

| Course Title           | The Complete Copilot Master Certification Course                                                    |
|------------------------|-----------------------------------------------------------------------------------------------------|
| Version                | 2026 Edition (Updated July 2026)                                                                    |
| Certification Awarded  | Copilot Master Certification (CMC) Badge                                                            |
| Audience               | Business professionals, IT administrators, knowledge workers, team leaders, and enterprise trainers |
| Duration               | Estimated 40 hours of instruction + hands-on labs                                                   |
| Delivery Formats       | Self-paced, instructor-led, or hybrid                                                               |
| Prerequisites          | Basic Microsoft 365 familiarity recommended                                                         |
| Total Modules          | 8 Modules + Appendices                                                                              |
| Total Knowledge Checks | 8 (5 questions each, auto-graded)                                                                   |
| Capstone Project       | Required for full CMC certification                                                                 |
| Badge Platform         | Credly (shareable to LinkedIn)                                                                      |
| Certification Validity | 2 years; renewable via 1-module refresher                                                           |

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# Course Introduction

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## Why Copilot Matters in 2026

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Microsoft Copilot has undergone a fundamental transformation. What began as an AI assistant embedded in Microsoft 365 apps has evolved into a full-scale **autonomous agent platform** — a "Frontier Firm" architecture in which AI agents operate as first-class organizational workers, capable of planning, executing, and handing off complex multi-step tasks across applications and systems.

At the heart of this evolution is **Work IQ** — Copilot's persistent memory and organizational intelligence layer, introduced at Microsoft Ignite 2025. Work IQ ingests email, files, meetings, and behavioral signals to give Copilot role-aware context, enabling agents to reason over all relevant organizational data rather than isolated fragments. Paired with **Copilot Cowork** — a capability developed in partnership with Anthropic — Copilot can now delegate long-running, multi-step work that unfolds over minutes or hours, coordinating actions across tools, producing real outputs, and maintaining transparent progress at every stage.

In 2026, Copilot Studio's **computer-using agents** are generally available, allowing organizations to automate processes through direct UI interaction — reaching legacy systems, vendor portals, and applications that lack APIs. The **Agent Store** provides a governed catalog of first- and third-party agents, and **Agent 365** provides the administrative control plane for organizations to discover, authorize, monitor, and govern fleets of AI agents at enterprise scale.

For professionals, teams, and organizations, mastering Copilot is no longer optional — it is a core competency for competitive relevance.

## What You Will Achieve

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By completing this course, you will move from foundational awareness to expert-level proficiency with Microsoft Copilot across every major Microsoft 365 application, the agentic platform, and the administrative and security landscape. You will be equipped to drive Copilot adoption, build custom agents, automate complex workflows, and lead AI transformation within your organization.

## How the Course Is Structured

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| Module | Title                                  | Est. Hours | Focus Area                                            |
|--------|----------------------------------------|------------|-------------------------------------------------------|
| 1      | Foundations of Microsoft Copilot       | 4 hrs      | Architecture, LLMs, Work IQ, Responsible AI           |
| 2      | Mastering Copilot Chat                 | 4 hrs      | Prompt engineering, Copilot Pages, advanced prompting |
| 3      | Copilot in Microsoft Word              | 4 hrs      | Drafting, rewriting, Agent Mode, reference grounding  |
| 4      | Copilot in Microsoft Excel             | 5 hrs      | Data analysis, Python, Analyst Agent, dashboards      |
| 5      | Copilot in PowerPoint, Outlook & Teams | 5 hrs      | Deck generation, email, meeting intelligence          |
| 6      | Copilot Agents                         | 6 hrs      | Agents, Copilot Studio, custom agent development      |
| 7      | Administration, Security & Compliance  | 6 hrs      | Licensing, admin center, Purview, governance          |
| 8      | Advanced Workflows & Real-             | 6 hrs      | Power Automate, Viva, Loop,                           |

| Module | Title          | Est. Hours | Focus Area       |
|--------|----------------|------------|------------------|
|        | World Projects |            | capstone project |

# How to Use This Course

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**Self-Paced Learners:** Work through each module sequentially. Complete all lessons, hands-on labs, and knowledge checks before advancing. Aim for 4–6 hours per week across 8–10 weeks for optimal retention.

**Instructor-Led Cohorts:** Instructors should allocate module time according to the schedule table above. Labs should be delivered in a shared M365 developer tenant environment. Group debrief sessions are recommended after each module's knowledge check.

**Hybrid Delivery:** Complete video lessons and readings asynchronously; conduct labs and capstone reviews in synchronous sessions.

## Lab Environment Required

All hands-on labs require access to a Microsoft 365 environment with Copilot licenses enabled. See **Appendix D: Lab Environment Setup Guide** for instructions on accessing the M365 Developer Tenant or a Copilot trial before beginning Module 1.

# Course-Level Learning Objectives

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Upon successful completion of all 8 modules, learners will be able to:

1. **Explain** the architecture of Microsoft Copilot, including the role of large language models (LLMs), grounding, the Microsoft Graph, the Semantic Index, and Work IQ in producing accurate, context-aware AI outputs. *(Remember / Understand)*
2. **Demonstrate** proficient use of Copilot Chat in both Web mode and Work mode, applying the CPCOF prompt engineering framework to produce high-quality, task-specific responses. *(Apply)*
3. **Design and refine** multi-turn prompt sequences using chain-of-thought reasoning, few-shot examples, and iterative refinement techniques to optimize Copilot output quality. *(Create / Evaluate)*
4. **Utilize** Copilot in Microsoft Word to draft, rewrite, summarize, and transform professional documents — including reports, proposals, and SOPs — using reference file grounding and Agent Mode. *(Apply)*
5. **Apply** Copilot in Microsoft Excel to perform natural-language data analysis, generate formulas and PivotTables, build dashboards, and produce narrative insight summaries using the Analyst Agent. *(Apply / Analyze)*
6. **Leverage** Copilot across Microsoft PowerPoint, Outlook, and Teams to generate presentations from source documents, summarize email threads, draft communications with coaching, and extract action items from recorded meetings. *(Apply)*
7. **Construct end-to-end cross-application workflows** that move from a Teams meeting through Copilot Recap to Outlook follow-up to a PowerPoint deliverable, using Copilot at each stage. *(Create)*
8. **Distinguish** between types of Copilot agents (declarative, autonomous, computer-using), identify their appropriate use cases, and select agents from the Agent Store for specific business needs. *(Analyze / Evaluate)*
9. **Build and configure** a custom agent in Copilot Studio using natural-language instructions, knowledge source connections (SharePoint, web), and topic-based conversation design. *(Create)*

10. **Evaluate and apply** Microsoft Purview sensitivity labels, data residency policies, audit log review, and acceptable-use governance frameworks to ensure compliant and secure Copilot deployments. *(Evaluate / Apply)*
11. **Administer** Microsoft 365 Copilot across a tenant: configure licensing, enable or restrict Copilot features, manage agent permissions via Agent 365, and implement change management strategies to drive adoption. *(Apply)*
12. **Integrate** Copilot with Power Automate to automate multi-step business workflows, and leverage Copilot in Viva, Loop, OneNote, and Copilot Notebooks to enhance collaboration and knowledge management. *(Apply / Create)*
13. **Design and document** a complete Copilot-powered business workflow, including a prompt library, agent configuration plan, and executive summary suitable for organizational leadership review. *(Create)*
14. **Assess** the ethical implications of AI use in the workplace, articulate Microsoft's Responsible AI principles, and apply fairness and privacy safeguards within their own Copilot deployments. *(Evaluate)*
15. **Articulate** Copilot's strategic roadmap, multimodel strategy, and the principles needed to sustain AI fluency as the platform continues to evolve through continuous releases. *(Understand / Evaluate)*

### Bloom's Taxonomy Alignment

All learning objectives are tagged to Bloom's Taxonomy cognitive levels (Remember, Understand, Apply, Analyze, Evaluate, Create). This ensures assessments and labs test higher-order thinking — not just recall — and that certification holders can demonstrate real workplace competency.

## MODULE 1: Foundations of Microsoft Copilot

Estimated Duration: 4 Hours | Includes 1 Hands-On Lab & 1 Knowledge Check

Module 1 establishes the conceptual and technical foundation every Copilot practitioner needs. Before you can use Copilot effectively — let alone administer it or build agents — you must understand what Copilot is, how it works, why it produces the outputs it does, and what guardrails govern its use. This module demystifies the AI stack, grounds you in Microsoft's ecosystem approach, and introduces the ethical principles that must guide all Copilot usage.

### Module 1 Learning Objectives

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By the end of Module 1, you will be able to:

16. Explain the architecture of Microsoft Copilot, including LLMs, the Microsoft Graph, the Semantic Index, and grounding mechanisms.
17. Identify where Copilot is available across the Microsoft ecosystem and describe the functional differences between each surface.
18. Describe what a large language model is, how tokenization and context windows work, and how Copilot uses retrieval-augmented generation (RAG) to improve accuracy.
19. Articulate the purpose and function of Work IQ as Copilot's organizational memory and intelligence layer.
20. Apply Microsoft's Responsible AI principles to evaluate the appropriateness and risk of specific Copilot use cases.

### Lesson 1.1 — What Is Microsoft Copilot? Architecture, Models, and the AI Stack

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Microsoft Copilot is an AI-powered productivity layer built on top of the Microsoft 365 platform and powered by large language models (LLMs). At its core, Copilot combines three elements: a frontier AI model (currently a multimodel architecture supporting models from OpenAI, Anthropic, and others), the **Microsoft Graph** (your organization's structured data — emails, files, meetings, contacts, calendar), and the **Semantic Index for Copilot** (a vector embedding layer that enables semantic, concept-level search across organizational content).

When you submit a prompt to Copilot, the system does not simply send your message to a language model. Instead, it performs **grounding**: enriching your query with relevant context drawn from the Graph and Semantic Index before passing the combined prompt to the LLM for response generation. The result is returned, filtered through Microsoft's safety and compliance layer, and delivered as the Copilot response you see in your app.

Microsoft's **multimodel strategy** means Copilot selects the most appropriate AI model for each task — choosing reasoning-optimized models for analysis, speed-optimized models for real-time tasks, and domain-specific models for specialized applications. This is what Microsoft calls its "best model for the job" philosophy.

## Lesson 1.2 — Copilot Across the Microsoft Ecosystem

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Copilot is not a single product — it is a family of AI experiences embedded throughout Microsoft's product portfolio:

| Surface            | Primary Copilot Experience                                        | Key Capability                                       |
|--------------------|-------------------------------------------------------------------|------------------------------------------------------|
| Microsoft 365 Apps | Copilot in Word, Excel, PowerPoint, Outlook, Teams, OneNote, Loop | In-app AI assistance grounded in organizational data |
| Copilot Chat       | Business-grade conversational AI (Web + Work modes)               | Research, document generation, agent orchestration   |
| Windows 11         | Windows Copilot                                                   | OS-level assistance, settings, and task management   |
| GitHub             | GitHub Copilot                                                    | Code completion, review, and documentation           |

| Surface            | Primary Copilot Experience | Key Capability                                 |
|--------------------|----------------------------|------------------------------------------------|
| Azure              | Copilot in Azure           | Infrastructure management and cloud operations |
| Microsoft Security | Microsoft Security Copilot | Threat hunting, incident response, compliance  |
| Dynamics 365       | Copilot in Dynamics        | CRM and ERP AI augmentation                    |
| Bing / Edge        | Copilot in Bing and Edge   | Web-grounded consumer and commercial search AI |

## Lesson 1.3 — Understanding Large Language Models (LLMs) and How Copilot Uses Them

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A **Large Language Model (LLM)** is a neural network trained on vast text corpora to predict and generate language at scale. LLMs do not "think" in a human sense — they calculate the most statistically probable continuation of a given input (prompt) based on patterns learned during training. Key concepts every Copilot user must understand:

- **Tokens:** The basic units of text the model processes. Roughly, 1 token  $\approx$  0.75 words. A model's ability to "remember" within a conversation is bounded by its context window (measured in tokens).
- **Context Window:** The maximum amount of text a model can consider at one time. Modern frontier models support very large context windows, enabling complex document analysis.
- **Temperature:** A parameter controlling response randomness. Lower values yield more deterministic, focused responses; higher values yield more creative outputs.
- **Retrieval-Augmented Generation (RAG):** The technique Copilot uses to ground LLM responses in factual, current organizational data — reducing hallucinations and improving accuracy.

- **Hallucination:** The tendency of LLMs to generate plausible-sounding but factually incorrect content. Grounding via RAG and the Semantic Index significantly reduces (but does not eliminate) this risk.

## Lesson 1.4 — Work IQ: Copilot's Persistent Memory and Organizational Intelligence Layer

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**Work IQ** is Microsoft's organizational intelligence layer, introduced as part of the Microsoft 365 Copilot Wave 3 announcement. Work IQ ingests signals across a user's and organization's Microsoft 365 activity — emails, files, meeting recordings, calendar events, and behavioral patterns — to build a persistent, role-aware context model that Copilot can draw on across sessions.

In practical terms, Work IQ enables Copilot to "know" that you are a sales manager who worked on the Q3 Contoso proposal last month, is preparing for a board presentation next week, and regularly collaborates with the finance team — without you having to re-explain this context in every session. This makes Copilot's outputs more relevant, more personalized, and more immediately useful.

Work IQ also powers **Copilot Cowork**, which enables long-running, delegated, multi-step tasks that persist across time — allowing Copilot to carry complex work forward autonomously while maintaining observable, steerable progress.

### Privacy Note

Work IQ operates within Microsoft's enterprise data protection boundaries. Organizational data is never used to train public AI models. All Work IQ data is protected by your tenant's existing Microsoft Purview policies, sensitivity labels, and access controls. Only data a user has permission to access is surfaced to that user through Copilot.

## Lesson 1.5 — Responsible AI: Ethics, Fairness, Privacy, and Compliance in Copilot

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Microsoft's AI development is governed by six **Responsible AI Principles**: Fairness, Reliability & Safety, Privacy & Security, Inclusiveness, Transparency, and Accountability. Copilot is designed and audited against these principles, and all practitioners are expected to apply them in their own use of the platform.

- **Fairness:** Avoid prompts that could produce discriminatory or biased outputs. Review AI-generated content for bias before publishing or acting on it.
- **Reliability & Safety:** Verify AI-generated facts, especially in high-stakes contexts such as legal, financial, or medical decisions.
- **Privacy & Security:** Never input personally identifiable information (PII), confidential client data, or trade secrets into Copilot in ways that violate your organization's data governance policies.
- **Inclusiveness:** Use Copilot to improve accessibility — generating alt text, simplifying language, or providing translated summaries — rather than to exclude or marginalize.
- **Transparency:** Disclose AI involvement in content creation where required by policy, regulation, or professional standards.
- **Accountability:** You are responsible for the content Copilot generates on your behalf. Always review, edit, and approve AI-generated outputs before sharing.

### Key Concepts — Module 1

**LLM (Large Language Model):** Neural network trained on text to generate language at scale.

**Grounding:** Enriching a prompt with real organizational data before sending to

the LLM to improve accuracy.

**Semantic Index:** Microsoft's vector-embedding search layer that enables concept-level retrieval across M365 content.

**Microsoft Graph:** The API and data layer connecting all structured M365 data (mail, calendar, files, contacts).

**Work IQ:** Copilot's persistent organizational intelligence and memory layer.

**RAG (Retrieval-Augmented Generation):** The process of retrieving relevant documents/data to ground LLM responses in fact.

**Responsible AI:** Microsoft's six-principle framework governing ethical AI design and use.

## Hands-On Lab 1: Your First Copilot Session

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**Objective:** Activate Copilot, navigate the Copilot Chat interface, submit structured prompts, and observe how Work mode vs. Web mode affects response grounding.

21. Sign in to your M365 environment and open Copilot Chat  
([copilot.microsoft.com](https://copilot.microsoft.com) or via the M365 app launcher).
22. Toggle between **Web mode** and **Work mode**. Note the context indicator change.
23. In Web mode, ask: *"Summarize Microsoft's Responsible AI principles and give me a real-world example for each."*
24. Switch to Work mode. Ask: *"What documents have I worked on most recently related to [a topic relevant to your role]?"*
25. Submit a follow-up prompt asking Copilot to format the previous response as a numbered action list.
26. Use the **Copilot Pages** button to save your response as a persistent page and share the link with a colleague or instructor.

**Lab Deliverable:** Screenshot of your Copilot Pages document shared with your lab partner or instructor, showing at least 3 distinct prompt responses compiled on a single page.

## Module 1 Knowledge Check

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27. Which of the following best describes "grounding" in the context of Microsoft Copilot?

- A) Training the LLM on new data
- B) Enriching a prompt with organizational context before sending to the LLM
- C) Resetting Copilot's memory between sessions
- D) Setting a model's temperature to zero

**Answer: B**

28. What is the primary purpose of the Semantic Index for Copilot?

- A) To manage user licenses
- B) To enable vector-based semantic search across M365 content
- C) To enforce sensitivity labels on documents
- D) To route prompts to the correct LLM model

**Answer: B**

29. Work IQ provides Copilot with which of the following capabilities?

- A) Real-time web search
- B) Code generation
- C) Persistent, role-aware organizational memory across sessions
- D) Voice transcription

**Answer: C**

30. Which Responsible AI principle requires users to disclose AI involvement in content creation?

- A) Fairness
- B) Inclusiveness
- C) Transparency
- D) Reliability

**Answer: C**

31. In which scenario does Copilot's RAG capability provide the MOST significant benefit?

- A) Generating a generic poem
- B) Producing a summary grounded in your company's internal documents
- C) Translating text between languages
- D) Formatting a table in Excel

**Answer: B**

## MODULE 2: Mastering Copilot Chat

Estimated Duration: 4 Hours | Includes 1 Lab, 1 Workshop Exercise & 1 Knowledge Check

Copilot Chat is the universal AI interface at the center of the Microsoft 365 Copilot experience. Whether you are researching a topic, drafting a strategy document, summarizing a report, or orchestrating a multi-agent workflow, Copilot Chat is where it begins. This module transforms you from a casual Copilot user into a deliberate, skilled prompt engineer who can consistently produce high-quality, relevant, and actionable AI outputs.

## Module 2 Learning Objectives

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- 32. Differentiate between Web mode and Work mode in Copilot Chat and select the appropriate mode for a given task.
- 33. Construct well-structured prompts using the CPCOF framework (Context, Persona, Constraints, Output, Format).
- 34. Create and share Copilot Pages as persistent, collaborative AI-generated documents.
- 35. Use Copilot's semantic search capability to locate and surface relevant organizational content using natural language.
- 36. Apply advanced prompting techniques — including chain-of-thought, few-shot examples, and iterative refinement — to improve response quality progressively.

# Lesson 2.1 — Copilot Chat Deep Dive: Web Mode vs. Work Mode

Copilot Chat operates in two primary modes, each with a distinct grounding strategy:

| Feature           | Web Mode                                       | Work Mode                                                 |
|-------------------|------------------------------------------------|-----------------------------------------------------------|
| Data Source       | Public internet (Bing-powered)                 | Your M365 tenant (Graph + Semantic Index)                 |
| Best For          | Research, general knowledge, news, public data | Internal documents, emails, meetings, organizational data |
| Privacy           | Responses may reference public sources         | Strictly tenant-contained; no data leaves your tenant     |
| Citations         | Web URLs and sources cited                     | Internal file references and document links cited         |
| Agent Integration | Limited                                        | Full agent and plugin ecosystem available                 |

The ability to fluidly switch between modes — or combine them using connectors — is a hallmark of advanced Copilot Chat usage.

# Lesson 2.2 — Prompt Engineering Fundamentals: The CPCOF Framework

The quality of your Copilot output is directly proportional to the quality of your prompt. The **CPCOF Framework** provides a repeatable structure for crafting effective prompts:

## The CPCOF Framework

**C — Context:** What is the situation or background Copilot needs to understand? (e.g., "I am preparing a board presentation on Q3 financial results...")

**P — Persona:** What role should Copilot adopt? (e.g., "Act as an experienced

financial analyst...")

**C — Constraints:** What limitations apply? (e.g., "Keep the response under 300 words; avoid technical jargon...")

**O — Output:** What specific deliverable do you need? (e.g., "Produce 5 key talking points...")

**F — Format:** How should the response be structured? (e.g., "Format as a numbered list with a bold header for each point.")

A weak prompt gives Copilot too little to work with; an overly prescriptive prompt may constrain creativity unnecessarily. The CPCOF framework helps you strike the right balance — providing enough structure to guide the AI without over-specifying every word.

## Lesson 2.3 — Copilot Pages: Turning AI Responses into Persistent, Shareable Documents

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**Copilot Pages** is a feature within Copilot Chat that allows you to save AI-generated responses as persistent, collaborative documents — similar to a Loop page — that can be edited, shared, and built upon over time. Rather than losing valuable AI outputs to chat history, Copilot Pages creates a living document that your team can co-author and refine.

Key use cases for Copilot Pages include: compiling research from multiple prompting sessions, building team knowledge bases from AI-generated summaries, and creating shareable briefing documents for stakeholders.

## Lesson 2.4 — AI-Powered Search: Combining Natural Language with Semantic Indexing

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Copilot in Work mode functions as a semantic search engine across your entire M365 content estate. Unlike traditional keyword search, semantic search understands *meaning* — so asking "Find the proposal we submitted to Northwind

last spring" will surface relevant documents even if those exact words do not appear in the file name or body.

Best practices for Copilot-powered search:

- Use natural language: describe what you're looking for, not the exact filename.
- Add context: include approximate dates, project names, or collaborators to narrow results.
- Ask for synthesis: instead of just finding a file, ask Copilot to summarize the key points from the relevant documents it finds.
- Follow up: refine results with follow-up prompts like "Focus only on the financial sections" or "Now find the most recent version."

## Lesson 2.5 — Advanced Prompting: Chain-of-Thought, Few-Shot Examples, and Iterative Refinement

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**Chain-of-Thought (CoT):** Instruct Copilot to reason step-by-step before delivering a conclusion. Example: *"Think through the pros and cons of each option before recommending one."* This produces more nuanced, reliable outputs for complex analytical tasks.

**Few-Shot Prompting:** Provide 2-3 examples of the desired output format within the prompt itself. Copilot uses these examples to pattern-match its response. Particularly effective for consistent formatting across large volumes of content.

**Iterative Refinement:** Treat the first response as a draft, not a final product. Follow up with targeted refinement prompts: *"Make the tone more formal," "Add a third example to point two," "Shorten the conclusion by 50%."* Expert Copilot users typically use 3-5 turns to reach a production-ready output.

## Hands-On Lab 2: The CPCOF Prompt Challenge

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**Objective:** Craft 10 structured prompts across 5 business scenarios using the CPCOF framework; compile results in a Copilot Page.

| # | Business Scenario       | Prompt Task                                                                               |
|---|-------------------------|-------------------------------------------------------------------------------------------|
| 1 | Executive Communication | Draft an email from a VP to the board summarizing a product launch decision               |
| 2 | Market Research         | Produce a 5-point competitive analysis of a given industry using web mode                 |
| 3 | HR Policy Communication | Rewrite a dense HR policy paragraph in plain English for all-staff distribution           |
| 4 | Project Planning        | Generate a phased project timeline for a software implementation initiative               |
| 5 | Customer Communication  | Draft a service outage notification email — professional, empathetic, and action-oriented |

For each scenario, submit 2 prompts: one initial CPCOF-structured prompt, and one iterative refinement follow-up. Save all 10 responses to a single Copilot Page titled "CPCOF Lab: [Your Name]" and share it with your instructor.

## Prompt Rewrite Workshop Exercise

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Improve the following 5 weak prompts using CPCOF principles. Compare your rewrites with a partner and discuss what specific elements you added and why.

37. *Weak*: "Write about AI." → Rewrite using full CPCOF structure for a business strategy context.
38. *Weak*: "Make this better." → Rewrite specifying tone, audience, length, and improvement criteria.
39. *Weak*: "Summarize the meeting." → Rewrite specifying which meeting, what level of detail, and what format the summary should take.
40. *Weak*: "Give me a list of ideas." → Rewrite with topic, constraints, number of ideas, and persona.

41. *Weak*: "Explain this to me." → Rewrite specifying topic, audience technical level, analogies requested, and output length.

## Module 2 Knowledge Check

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42. Which Copilot Chat mode should you use to find internal documents from last quarter's budget review?

A) Web Mode B) Work Mode C) Developer Mode D) Either mode equally

**Answer: B**

43. In the CPCOF framework, what does the "P" stand for?

A) Purpose B) Prompt C) Persona D) Priority

**Answer: C**

44. What is the primary advantage of Copilot Pages over standard chat responses?

A) Faster AI response time B) Persistent, shareable, collaborative AI-generated documents C) Access to private model features D) Automatic translation

**Answer: B**

45. Which advanced prompting technique instructs Copilot to reason step-by-step before delivering an answer?

A) Few-shot prompting B) Zero-shot prompting C) Chain-of-thought prompting D) Iterative refinement

**Answer: C**

46. A few-shot prompt is best described as:

A) A very short, minimal prompt B) A prompt that includes 2–3 examples of the desired output format C) A prompt submitted at reduced token count D) A prompt run in Web mode only

**Answer: B**

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## MODULE 3: Copilot in Microsoft Word

Estimated Duration: 4 Hours | Includes 1 Graded Lab, 1 Rubric Assessment & 1 Knowledge Check

Microsoft Word is where organizational knowledge becomes formal documents — and Copilot transforms the document creation process from a blank-page challenge into a structured, iterative, AI-accelerated workflow. In this module, you will master every Copilot capability within Word, from first draft to polished final document.

### Module 3 Learning Objectives

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- 47. Use Copilot's Draft, Rewrite, and Summarize functions in Word to create and transform professional documents.
- 48. Leverage Agent Mode in Word for iterative, research-integrated document creation across multiple turns.
- 49. Ground Word Copilot outputs in reference files, SharePoint documents, and internal data sources.
- 50. Adapt document tone, length, and audience level using Copilot's Transform capabilities.
- 51. Apply Copilot in Word to real-world use cases including business proposals, SOPs, reports, and marketing content.

### Lesson 3.1 — Draft, Summarize, and Rewrite with Copilot in Word

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Copilot in Word appears as a floating prompt icon and as the dedicated **Copilot pane** on the right side of the document. Core capabilities include:

- **Draft with Copilot:** Generate a full document section from a brief prompt. Click the Copilot icon in the margin, describe what you want, and Copilot produces an immediate draft inline.
- **Summarize:** Paste or open a long document and ask Copilot to produce an executive summary, a bulleted overview, or a section-by-section digest.
- **Rewrite:** Select any text passage and ask Copilot to rewrite it — with options to adjust tone (formal, casual, confident, empathetic), length (expand or condense), or reading level.
- **Coach:** Submit draft text and receive structured feedback on clarity, persuasiveness, and completeness without Copilot rewriting it for you.

## Lesson 3.2 — Agent Mode in Word: Iterative Document Creation and Research Integration

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**Agent Mode** in Word, introduced in Microsoft 365 Wave 3, elevates Copilot from a single-turn assistant to a multi-step collaborator capable of building complex documents through an orchestrated series of actions. In Agent Mode, Copilot can: browse referenced files and URLs to pull in research, generate and insert multiple document sections in sequence, check its own outputs against reference criteria, and propose structural revisions based on the evolving document.

Agent Mode is particularly valuable for long-form documents such as RFP responses, regulatory submissions, strategy memos, and multi-section reports where content must be consistent across many sections and grounded in multiple source materials simultaneously.

## Lesson 3.3 — Using Reference Files and Internal Data to Ground Word Output

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Copilot in Word's most powerful capability is its ability to reference other files — SharePoint documents, OneDrive files, emails, and meeting notes — when generating content. To use reference grounding:

- 52. Open the Copilot pane in Word.
- 53. Begin your prompt and type "/" to browse and attach reference files.
- 54. Select 1–3 reference documents (meeting notes, a data brief, a prior report, etc.).
- 55. Instruct Copilot: *"Using the attached Q2 sales report and the product roadmap, draft a 2-page executive summary for the board."*

The resulting output will be grounded in the specific facts, figures, and language of your reference documents — dramatically reducing hallucination risk and eliminating the need to manually copy data into the document.

## Lesson 3.4 — Transforming Documents: Tone, Length, and Audience Adaptation

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A single source document can serve multiple audiences with different needs. Copilot makes document transformation fast and precise:

| Transformation Type            | Example Prompt                                                                          | Use Case                           |
|--------------------------------|-----------------------------------------------------------------------------------------|------------------------------------|
| Tone: Formal → Friendly        | "Rewrite this in a warm, accessible tone suitable for frontline employees."             | All-staff HR communications        |
| Tone: Technical → Executive    | "Rewrite this technical specification as a 3-paragraph executive brief."                | Board or leadership communications |
| Length: Expand                 | "Expand this bullet list into full paragraphs with supporting rationale."               | Converting an outline to a draft   |
| Length: Condense               | "Reduce this 5-page report to a 1-page summary without losing the key recommendations." | Executive one-pagers               |
| Audience: Specialist → General | "Rewrite this for a general business audience with no technical background."            | Cross-functional communications    |

## Lesson 3.5 — Real-World Use Cases

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- **Business Proposals:** Start from a bullet-point brief; Copilot drafts the full proposal; reference documents ground it in client-specific data.
- **Standard Operating Procedures (SOPs):** Describe a workflow verbally; Copilot structures it as a numbered SOP with decision points.
- **Research Reports:** Copilot summarizes multiple referenced documents and synthesizes findings into a coherent narrative.
- **Marketing Content:** Generate on-brand copy in multiple formats (blog post, one-pager, email) from a single product brief.
- **RFP Responses:** Copilot Agent Mode pulls from past proposals, product documentation, and pricing sheets to auto-draft each RFP section.

### Hands-On Lab 3: The Business Proposal Challenge

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**Objective:** Use Copilot to draft a 3-page business proposal from a bullet-point brief, then refine it using follow-up prompts and reference documents.

56. Download the "Lab 3 Brief" file from the course lab environment (a 10-bullet project brief for a fictional client engagement).
57. Open a new Word document. Open the Copilot pane. Reference the Lab 3 Brief file.
58. Prompt: *"Using the attached project brief, draft a professional 3-page business proposal with the following sections: Executive Summary, Problem Statement, Proposed Solution, Timeline, and Investment."*
59. Review the draft. Use at least 3 follow-up Copilot prompts to: (a) adjust the tone of the Executive Summary, (b) expand the Solution section with more technical detail, and (c) condense the Timeline section.
60. Ask Copilot to add an "About Our Firm" closing section in a confident, professional tone.

61. Submit the completed proposal for graded rubric assessment.

## Lab 3 Graded Assessment Rubric

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| Criterion              | Excellent (4)                                              | Proficient (3)                           | Developing (2)             | Insufficient (1)                |
|------------------------|------------------------------------------------------------|------------------------------------------|----------------------------|---------------------------------|
| Document Completeness  | All 5 sections present and fully developed                 | All sections present; 1-2 underdeveloped | 3-4 sections present       | Fewer than 3 sections           |
| Accuracy & Grounding   | All content grounded in brief; no unsupported claims       | Mostly grounded; 1-2 minor deviations    | Some unsupported additions | Significant inaccuracies        |
| Tone & Professionalism | Consistently professional; appropriate for a client        | Generally professional; minor lapses     | Inconsistent tone          | Unprofessional or generic       |
| Copilot Usage Quality  | Evidence of 3+ iterative refinements with targeted prompts | Evidence of 1-2 refinements              | Single-turn draft only     | No evidence of prompt iteration |
| Format & Readability   | Clear headings, consistent formatting, appropriate length  | Good formatting; minor inconsistencies   | Some formatting gaps       | Poor structure or hard to read  |

## Module 3 Knowledge Check

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62. To ground a Copilot prompt in Word with a specific SharePoint document, you should:

- A) Copy and paste the document text into the prompt   B) Type "/" in the Copilot prompt to browse and attach the reference file   C) Email the document to Copilot   D) Open the document in a separate window

**Answer: B**

63. Agent Mode in Word differs from standard Copilot assistance in that it:

- A) Requires a separate license
- B) Supports multi-step, iterative document creation across multiple actions
- C) Only works with Excel files
- D) Disables the Rewrite function

**Answer: B**

64. Which Copilot in Word capability is best suited for getting structured feedback on your own draft without having it rewritten?

- A) Draft
- B) Rewrite
- C) Coach
- D) Summarize

**Answer: C**

65. A user needs to convert a 5-page technical specification into a 1-page executive brief. Which Copilot transformation is most appropriate?

- A) Expand
- B) Translate
- C) Condense with audience adaptation
- D) Add references

**Answer: C**

66. Which of the following is NOT a real-world use case for Copilot in Word covered in this module?

- A) Business proposals
- B) SOPs
- C) PivotTable creation
- D) RFP responses

**Answer: C**

## MODULE 4: Copilot in Microsoft Excel

Estimated Duration: 5 Hours | Includes 1 Hands-On Lab & 1 Knowledge Check

Data is the lifeblood of organizational decision-making, and Microsoft Excel is where that data lives. Copilot in Excel transforms natural language into instant analysis — eliminating the technical barrier between your business question and the insight

you need. This module takes you from basic Copilot interactions in Excel to advanced analytics powered by Python and the Analyst Agent.

## Module 4 Learning Objectives

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- 67. Use Copilot in Excel to perform natural-language data analysis, generate formulas, and identify patterns in datasets.
- 68. Leverage the Python in Excel integration with Copilot for advanced statistical analysis and visualization.
- 69. Configure and use the Analyst Agent for autonomous, multi-step data analysis and insight generation.
- 70. Build PivotTables and interactive dashboards using conversational Copilot prompts.
- 71. Apply Copilot in Excel to real-world scenarios including financial modeling, sales reporting, and operational analysis.

## Lesson 4.1 — Copilot in Excel: Data Analysis, Formula Generation, and Pattern Recognition

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Copilot in Excel activates when your data is formatted as an Excel Table (Ctrl+T). From the Copilot pane, you can interact with your data conversationally:

- **Analyze:** "What are the top 5 products by revenue this quarter?" — Copilot identifies patterns and highlights key insights.
- **Formula Generation:** "Write a formula that calculates the year-over-year growth rate for each region" — Copilot writes the formula and explains it.
- **Conditional Formatting:** "Highlight all rows where margin is below 15%" — Copilot applies the rule automatically.
- **Suggested Columns:** "Add a column showing profit margin as a percentage of revenue" — Copilot creates the calculated column with the appropriate formula.

#### **Prerequisite: Format as Table**

Copilot in Excel requires data to be in a structured Excel Table format. Before opening the Copilot pane, select your data range and press Ctrl+T to convert it to a Table. Copilot will not activate on unformatted data ranges.

## **Lesson 4.2 — Python in Excel + Copilot: Advanced Analytics and Visualization**

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**Python in Excel** (generally available as of 2025) brings the full Python data science ecosystem — including pandas, matplotlib, scikit-learn, and seaborn — directly into the Excel grid, without requiring any local Python installation. When combined with Copilot, this creates an extraordinarily powerful analysis environment:

- Ask Copilot to write Python code for a given analysis task; Copilot generates the Python cell code.
- Execute the Python code within Excel; results appear as Excel values or charts in the grid.
- Iterate: "Modify the chart to use a log scale on the Y-axis" — Copilot updates the Python code accordingly.

Use cases enabled by Python + Copilot in Excel include: regression analysis, time-series forecasting, clustering customer segments, building Monte Carlo simulations, and generating publication-quality statistical charts.

## **Lesson 4.3 — The Analyst Agent: Autonomous Data Analysis and Insight Generation**

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The **Analyst Agent** in Microsoft 365 Copilot is a purpose-built autonomous agent for data analysis. Unlike standard Copilot, which responds to individual prompts, the Analyst Agent accepts a high-level analytical objective — such as "Analyze this

sales dataset and identify the top 3 strategic insights for the leadership team" — and autonomously: explores the data, runs multiple analyses, generates charts and tables, writes narrative summaries, and compiles a structured report.

The Analyst Agent dramatically reduces the time from data to decision — collapsing hours of manual analysis into minutes of autonomous processing, with full transparency into every step taken.

## Lesson 4.4 — Building Dashboards and PivotTables with Natural Language

---

Creating Excel PivotTables and dashboards previously required deep familiarity with Excel's data model and visualization tools. Copilot eliminates this barrier:

72. Open your Table-formatted dataset in Excel and open the Copilot pane.

73. Prompt: *"Create a PivotTable showing total sales by region and product category for Q3."*

74. Copilot creates the PivotTable on a new sheet with appropriate row and column fields configured.

75. Follow up: *"Add a bar chart visualization of this PivotTable, sorted by total sales descending."*

76. Continue: *"Add a slicer for the Year field so I can filter the dashboard interactively."*

## Lesson 4.5 — Real-World Use Cases

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- **Financial Modeling:** Ask Copilot to build revenue projection formulas, run sensitivity analysis, and flag variance from budget.
- **Sales Data Analysis:** Identify top performers, lagging regions, seasonal trends, and at-risk accounts using natural language queries.
- **Operational Reporting:** Convert raw operational data into formatted management reports with KPI summaries and exception highlights.

- **HR Analytics:** Analyze headcount, attrition, and compensation data while Copilot flags anomalies and generates narrative context.

## Hands-On Lab 4: The Sales Data Analytics Challenge

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77. Download the "Lab 4 Sales Dataset" from the course lab environment (12 months of fictional multi-region sales data).
78. Format the data as an Excel Table. Open the Copilot pane.
79. Ask Copilot to identify the top 5 products by gross margin and highlight them with conditional formatting.
80. Ask Copilot to generate a formula calculating month-over-month revenue growth for each region.
81. Ask Copilot to create a PivotTable by Region and Product Category, then add a stacked bar chart.
82. Use the Analyst Agent: "Analyze this dataset and provide 3 strategic insights I should share with my sales leadership team."
83. Copy the Analyst Agent's summary narrative into a new Word document using Copilot in Word to format it as a one-page executive brief.

**Lab Deliverable:** Submit the completed Excel workbook (with PivotTable, chart, and highlighted insights) and the one-page Word brief to your instructor.

## Module 4 Knowledge Check

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84. What is a prerequisite for activating Copilot in Excel?  
A) The data must be in a SharePoint list   B) The data must be formatted as an Excel Table   C) The workbook must be saved to OneDrive   D) Python must be installed locally

**Answer: B**

85. Which capability allows Copilot in Excel to write and execute Python code within the spreadsheet?

A) Excel Macros B) Python in Excel integration C) Power Query D) Copilot Studio connector

**Answer: B**

86. The Analyst Agent differs from standard Copilot in Excel in that it:

A) Only runs on web-based Excel B) Accepts high-level objectives and autonomously runs multiple analyses end-to-end C) Requires a Python license D) Cannot create PivotTables

**Answer: B**

87. A user wants to build a PivotTable segmented by Region and Quarter using natural language. Which Copilot action is most appropriate?

A) Ask Copilot to "Generate a formula for total sales by region" B) Ask Copilot to "Create a PivotTable showing total sales by region and quarter" C) Manually build the PivotTable and ask Copilot to format it D) Use Web mode to research how to build the PivotTable

**Answer: B**

88. Which real-world use case is best suited for Python in Excel + Copilot?

A) Sending an email summary of results B) Building a Monte Carlo revenue simulation C) Creating meeting notes from a Teams recording D) Generating a Word proposal from a brief

**Answer: B**

## MODULE 5: Copilot in PowerPoint, Outlook, and Teams

Estimated Duration: 5 Hours | Includes 1 Cross-App Lab & 1 Knowledge Check

Communication is the connective tissue of every organization. In Module 5, you will master Copilot across the three Microsoft 365 applications where most

organizational communication flows: **PowerPoint** for visual storytelling, **Outlook** for email and scheduling, and **Teams** for meetings, channels, and real-time collaboration. Critically, you will learn to connect these three surfaces into seamless, end-to-end workflows.

## Module 5 Learning Objectives

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- 89. Generate professional PowerPoint presentations from text prompts, Word documents, and PDFs using Copilot in PowerPoint and Designer integration.
- 90. Draft emails, summarize threads, apply communication coaching, and optimize scheduling using Copilot in Outlook.
- 91. Generate meeting Recaps, extract action items, ask questions of channel content, and use the Facilitator Agent in Microsoft Teams.
- 92. Compile and synthesize information from Teams channel posts and catch up on missed conversations using Copilot.
- 93. Design and execute a cross-application Copilot workflow from Teams meeting to Outlook follow-up to PowerPoint deliverable.

### Lesson 5.1 — Copilot in PowerPoint: Generating Decks from Prompts, Word Docs, or PDFs

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Copilot in PowerPoint allows you to generate a complete, designed presentation from multiple starting points:

- **From a Prompt:** *"Create a 10-slide presentation on the benefits of cloud migration for mid-market enterprises, using a professional blue theme."*
- **From a Word Document:** Reference a Word file and Copilot extracts key points, structures them into slides, and applies your organization's template.
- **From a PDF:** Upload or reference a PDF (research report, white paper, RFP) and Copilot synthesizes it into a presentation-ready format.

**Designer Integration:** Copilot in PowerPoint works in concert with PowerPoint Designer to automatically suggest professional slide layouts, image placements, and visual hierarchies as content is generated — reducing design time while maintaining visual quality.

Post-generation Copilot capabilities in PowerPoint include: adding slides, reorganizing sections, adjusting the level of detail on specific slides, adding speaker notes, and adapting the entire presentation for a different audience.

## Lesson 5.2 — Copilot in Outlook: Email Drafting, Thread Summarization, Coaching, and Scheduling

---

Copilot in Outlook transforms the most time-consuming parts of email management:

| Capability           | Description                                                                     | Time Saved                                      |
|----------------------|---------------------------------------------------------------------------------|-------------------------------------------------|
| Draft Email          | Generate a full email from a brief set of bullet points                         | High — eliminates blank-page delay              |
| Thread Summarize     | Summarize a long email thread into key points and decisions in seconds          | Very High — especially for returning from leave |
| Coaching             | Review a draft and provide tone, clarity, and sentiment feedback before sending | Medium — improves communication quality         |
| Scheduling Assistant | Suggest optimal meeting times based on participants' availability patterns      | High — reduces scheduling back-and-forth        |
| Meeting Prep         | Summarize email history with a contact before a meeting                         | Medium — reduces manual review time             |

## Lesson 5.3 — Copilot in Teams: Meeting Summaries, Facilitator Agent, Action Items, and Recap

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**Copilot Recap** in Microsoft Teams automatically generates a structured meeting summary after any recorded Teams meeting, including: a full transcript (available via speech-to-text), an AI-generated summary of key discussion points, a list of

action items with owners, and follow-up questions raised during the meeting. Recap is accessible post-meeting in the meeting chat and in the Teams Meeting Recap tab.

The **Facilitator Agent** is an AI meeting companion that operates *during* a live Teams meeting, providing real-time note-taking, surfacing relevant documents as they are referenced, answering participant questions by querying organizational data, and preparing a Recap draft before the meeting ends.

During a meeting, you can also query Copilot live: *"What has been agreed so far on the budget question?"* or *"Summarize what was said before I joined."*

## Lesson 5.4 — Copilot in Teams Channels: Catch-Up Summaries and Q&A Across Posts

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For Teams channels, Copilot provides a conversational interface over the full channel history. Practical applications include:

- *"Summarize all activity in the #project-alpha channel from the past two weeks."*
- *"What decisions were made in this channel regarding the vendor selection?"*
- *"Who has been most active in this channel this month, and what topics have they raised?"*
- *"List all action items that have been mentioned in this channel but not marked as resolved."*

## Lesson 5.5 — Cross-App Workflows: From Meeting to Report to Presentation

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The true power of Microsoft 365 Copilot emerges when you connect capabilities across applications into seamless workflows. Example end-to-end workflow for a project kickoff:

94. **Teams:** Record the kickoff meeting. Copilot Facilitator takes notes in real-time. Recap generates action items post-meeting.

95. **Outlook:** Copilot drafts follow-up emails to each stakeholder group, incorporating action items from Recap.
96. **Word:** Copilot drafts the Project Charter document using the Recap summary and attendee notes as reference files.
97. **PowerPoint:** Copilot generates a kickoff summary deck from the Word Project Charter for the broader organization.
98. **Excel:** Copilot creates a project tracking table from the extracted action items and assigns due dates.

## Hands-On Lab 5: The Project Kickoff Simulation

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**Objective:** Run a simulated project kickoff using Copilot across Teams, Outlook, and PowerPoint in a connected workflow.

99. Download the "Lab 5 Meeting Recording" and "Lab 5 Meeting Transcript" files from the course environment (a 20-minute fictional project kickoff recording).
100. Upload to Teams and use Copilot Recap to generate: a meeting summary, a list of action items, and 3 follow-up questions.
101. In Outlook, use Copilot to draft a follow-up email to the project sponsor summarizing the kickoff outcomes and confirming next steps. Apply coaching feedback before "sending" (submit to your instructor).
102. In PowerPoint, prompt Copilot: *"Create a 6-slide kickoff summary presentation based on the meeting summary [paste summary text]"*. Review and refine 2 slides using follow-up prompts.
103. Submit: the Recap screenshot, the drafted Outlook email, and the PowerPoint deck.

## Module 5 Knowledge Check

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104. Which starting point does Copilot in PowerPoint NOT currently support for deck generation?

A) A written prompt B) A Word document C) A PDF D) A live video stream

**Answer: D**

105. The Copilot Coaching feature in Outlook is primarily used to:

A) Schedule meetings automatically B) Provide tone, clarity, and sentiment feedback on draft emails C) Summarize email threads D) Block calendar time for focus work

**Answer: B**

106. The Facilitator Agent in Teams operates during a meeting to:

A) Record the video of the meeting B) Provide real-time note-taking, document surfacing, and answer participant questions C) Translate the meeting into multiple languages D) Manage participant access

**Answer: B**

107. A user returns from a 2-week vacation and wants to catch up on all decisions made in the #product-launch Teams channel. Which Copilot action is most efficient?

A) Read every channel message manually B) Ask Copilot to summarize all activity from the past two weeks C) Schedule a meeting to be briefed by a colleague D) Search the channel using keywords

**Answer: B**

108. In the Module 5 cross-app workflow example, what is the correct sequence?

A) PowerPoint → Outlook → Teams → Word B) Teams Recap → Outlook drafts → Word Charter → PowerPoint deck C) Excel → Word → Teams → Outlook D) Copilot Chat → Teams → Excel → PowerPoint

**Answer: B**

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## MODULE 6: Copilot Agents — Working With and Building Agents

Estimated Duration: 6 Hours | Includes 2 Hands-On Labs, 1 Real-World Scenario & 1 Knowledge Check

Copilot Agents represent the most transformative capability in the Microsoft 365 Copilot platform. Agents are purpose-built AI systems that can autonomously plan and execute multi-step workflows, retrieve and reason over information from multiple sources, interact with applications, and collaborate with each other — all within the governed boundaries of your Microsoft 365 tenant. This module is the cornerstone of Copilot mastery at the enterprise level.

### Module 6 Learning Objectives

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- 109. Define Copilot agents, distinguish between agent types (declarative, autonomous, computer-using), and identify their architectural components.
- 110. Select and configure first-party Microsoft agents (Researcher, Analyst, Facilitator, and others) from the Agent Store for specific tasks.
- 111. Delegate complex, multi-step tasks to autonomous agents and monitor their progress effectively.
- 112. Build a functional custom agent in Copilot Studio using natural-language configuration and a SharePoint knowledge source.
- 113. Connect agents to external data sources, APIs, and enterprise systems using connectors and MCP (Model Context Protocol).
- 114. Describe the Copilot Cowork capability and articulate scenarios where delegating long-running work to Copilot provides maximum organizational value.

# Lesson 6.1 — What Are Copilot Agents? Architecture, Types, and the Agent Store

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A **Copilot Agent** is a configured AI system that combines an LLM with specific instructions, knowledge sources, action capabilities, and (optionally) memory — designed to autonomously fulfill a defined function. Unlike a single Copilot prompt, an agent can maintain state, execute multi-step plans, interact with external systems, and collaborate with other agents.

## Agent Types:

- **Declarative Agents:** Configured with a specific set of instructions, knowledge sources, and conversation topics. They respond to user queries within a defined scope. Built in Copilot Studio; no code required.
- **Autonomous Agents:** Accept high-level goals and proactively execute multi-step plans without per-step user instruction. They can trigger actions, call APIs, and produce outputs over time.
- **Computer-Using Agents (CUA):** Interact directly with desktop and web application UIs, enabling automation of processes in legacy systems without APIs. Generally available in Copilot Studio as of 2026.

The **Agent Store** in Microsoft 365 provides a governed catalog of first-party Microsoft agents, partner-built agents, and custom organizational agents. IT administrators control which agents are available to which users via Agent 365 governance policies.

# Lesson 6.2 — Microsoft-Built Agents: Researcher, Analyst, Facilitator, and More

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| Agent      | Primary Function                                                                | Best Used For                                        |
|------------|---------------------------------------------------------------------------------|------------------------------------------------------|
| Researcher | Deep research across internal and external sources; produces structured reports | Competitive analysis, market research, due diligence |

| Agent                       | Primary Function                                                                   | Best Used For                                                      |
|-----------------------------|------------------------------------------------------------------------------------|--------------------------------------------------------------------|
| Analyst                     | Autonomous data analysis across Excel, Power BI, and connected data sources        | Financial modeling, sales analytics, operational reporting         |
| Facilitator                 | Real-time meeting intelligence, note-taking, and action item extraction in Teams   | All meeting types; particularly complex multi-stakeholder meetings |
| Interpreter                 | Real-time translation and interpretation during Teams meetings                     | Multilingual global meetings and events                            |
| Employee Self-Service Agent | Answers HR, IT, and policy questions from connected knowledge bases                | HR service desks, IT help desks, onboarding                        |
| Sales Development Agent     | Researches prospects, drafts outreach, and manages early-stage pipeline activities | Sales development, lead nurturing, account research                |

## Lesson 6.3 — Using Agents for Multi-Step, Autonomous Workflows

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Autonomous agents accept a high-level objective and decompose it into a plan — executing each step, evaluating intermediate results, and adjusting as needed. Key principles for working effectively with autonomous agents:

- **Be specific about the goal, not the steps:** Instead of dictating each action, describe the desired outcome. Let the agent determine the optimal path.
- **Set boundaries:** Define what data sources the agent should use, what actions it may take, and what escalation triggers require human review.
- **Monitor, don't micromanage:** Autonomous agents surface transparent progress updates. Review these checkpoints and provide steering input when the agent diverges from intent.
- **Review all outputs:** Agent-generated content should be reviewed before being shared or acted upon in consequential business contexts.

## Lesson 6.4 — Introduction to Copilot Studio: Building Custom Agents with Natural Language

---

**Microsoft Copilot Studio** is the low-code platform for building, testing, publishing, and governing custom Copilot agents. No programming experience is required to build effective declarative agents. The Copilot Studio authoring experience includes:

115.      **Agent Identity:** Name, description, icon, and scope definition.
116.      **Instructions:** Natural-language system prompt defining the agent's persona, capabilities, tone, and behavior guidelines.
117.      **Knowledge Sources:** Connect SharePoint document libraries, websites, Dataverse tables, or custom APIs as the agent's knowledge base.
118.      **Topics:** Define conversation flows for specific user intents — from simple FAQ responses to complex multi-turn guided workflows.
119.      **Actions:** Connect to Power Automate flows, HTTP endpoints, or Connector APIs to enable the agent to take real-world actions (create records, send emails, update databases).
120.      **Publishing:** Deploy the agent to Microsoft Teams, a website widget, Copilot Chat, or a custom channel.

## Lesson 6.5 — Extending Agents: External Data, APIs, and Enterprise Systems

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Custom agents become exponentially more powerful when connected to enterprise data and systems. Copilot Studio supports three primary extension patterns:

- **Connectors:** Pre-built integrations to 1,000+ services (Salesforce, ServiceNow, SAP, Workday, GitHub, and more) via Power Platform connectors.

- **Model Context Protocol (MCP):** An emerging open standard that allows agents to connect to any MCP-compatible data source or tool, enabling interoperability across AI ecosystems.
- **Custom API Actions:** Call any REST API directly from an agent action, enabling integration with proprietary or custom-built enterprise systems.

## Lesson 6.6 — Copilot Cowork: Delegating Long-Running, Multi-Step Work

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**Copilot Cowork**, developed in collaboration with Anthropic, brings extended autonomous operation into Microsoft 365 Copilot. With Cowork, you can delegate meaningful, complex work tasks — such as preparing a comprehensive competitor analysis, drafting a full project proposal, or processing a batch of research requests — and Copilot will execute the work over time, providing visible progress updates and opportunities for you to steer or redirect at key checkpoints.

### ✓ Enterprise Trust Guarantees for Cowork

All Cowork outputs are immediately stored as enterprise knowledge protected by your tenant's existing Microsoft Purview policies. Work is observable and transparent. Actions can be reviewed, guided, or stopped at any point. Copilot Cowork never takes irreversible actions without human review checkpoints.

## Hands-On Lab 6A: Researcher Agent — Competitive Analysis

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121. Open Copilot Chat and navigate to the Agent Store. Select and activate the **Researcher Agent**.
122. Provide the following objective: *"Produce a competitive analysis comparing three cloud productivity platforms on the following dimensions: AI*

*capabilities, pricing, security features, and integration ecosystem. Format as a structured report with an executive summary, comparison table, and 3 strategic recommendations."*

123. Review the agent's research plan before it executes. Provide any steering input.
124. Review the completed report. Submit 2 follow-up refinement prompts to the agent.
125. Save the final report to a Copilot Page and share with your instructor.

## Hands-On Lab 6B: Build a Custom HR Agent in Copilot Studio

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126. Navigate to Copilot Studio ([copilotstudio.microsoft.com](https://copilotstudio.microsoft.com)). Create a new agent.
127. Name: *"HR Policy Assistant"*. Write a system instruction: *"You are a helpful HR assistant for Contoso. Answer employee questions about company policies, benefits, and procedures. Always be professional, empathetic, and accurate. If you are unsure, escalate to hr@contoso.com."*
128. Add a Knowledge Source: connect the course-provided SharePoint document library containing 5 fictional HR policy documents.
129. Test the agent with 5 policy questions. Verify that responses are accurately grounded in the connected documents.
130. Publish the agent to Microsoft Teams.
131. Submit a screenshot of the published agent responding correctly to 3 policy questions.

## Real-World Scenario: The Sales Development Agent at Work

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**Scenario:** Northwind Industrial deploys Microsoft's Sales Development Agent to support their 50-person inside sales team. Here is the end-to-end workflow:

132.      **Lead Ingestion:** New leads from the marketing automation platform flow into Dynamics 365 via a Power Automate connector.
133.      **Research:** The Sales Development Agent autonomously researches each lead — pulling LinkedIn data, company financials, recent news, and internal CRM history.
134.      **Qualification:** The agent scores each lead against the ICP (Ideal Customer Profile) criteria configured in its instructions.
135.      **Outreach Draft:** For qualified leads, the agent drafts a personalized outreach email referencing specific research findings about the prospect's business context.
136.      **Human Review:** A sales rep reviews the draft in Outlook, edits if needed, and approves for sending.
137.      **Follow-Up:** The agent tracks responses and drafts follow-up sequences based on engagement signals.
138.      **Reporting:** The Analyst Agent generates a weekly pipeline report showing agent-assisted outreach metrics and conversion rates.

## Module 6 Knowledge Check

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139.      Which type of Copilot agent is designed to interact directly with web and desktop application UIs?  
A) Declarative Agent   B) Autonomous Agent   C) Computer-Using Agent   D) Retrieval Agent

**Answer: C**

140.      What is the primary function of the Agent Store in Microsoft 365?  
A) To store agent configuration files   B) To provide a governed catalog of first- and third-party agents   C) To manage agent API keys   D) To publish

agents to external websites

**Answer: B**

141. When building a custom agent in Copilot Studio, which component defines the agent's persona, tone, and behavioral guidelines?
- A) Knowledge Source B) Topic Flow C) System Instructions D) Connector Action

**Answer: C**

142. MCP (Model Context Protocol) in the context of Copilot agents refers to:
- A) A Microsoft Certification Program B) An open standard enabling agents to connect to any MCP-compatible data source or tool C) A memory compression protocol for LLMs D) A Microsoft Purview compliance policy

**Answer: B**

143. Copilot Cowork is best described as:
- A) A Teams collaboration feature for co-editing documents B) A capability enabling Copilot to execute long-running, multi-step delegated tasks with transparent progress C) A feature for scheduling Copilot usage across a team D) A billing model for enterprise Copilot usage

**Answer: B**

## MODULE 7: Copilot Administration, Security, and Compliance

Estimated Duration: 6 Hours | Includes 1 Lab, 1 Compliance Assessment & 1 Knowledge Check

Deploying Copilot at enterprise scale is not simply a matter of turning on a license. It requires deliberate governance, robust security configuration, compliance alignment, and a thoughtful change management strategy. Module 7 prepares IT

administrators, security professionals, and enterprise trainers to deploy and govern Microsoft 365 Copilot responsibly and effectively.

## Module 7 Learning Objectives

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- 144. Identify the licensing requirements for Microsoft 365 Copilot and explain the implications of different SKUs for feature availability.
- 145. Configure Copilot settings in the Microsoft 365 Admin Center, including enabling, restricting, and monitoring Copilot across the tenant.
- 146. Explain Microsoft's data residency and privacy guarantees for Copilot and configure Microsoft Purview integration for Copilot governance.
- 147. Describe how Security Copilot agents integrate with Microsoft Defender and Entra ID for threat detection and response.
- 148. Implement governance best practices including acceptable use policies, audit log review, and sensitivity label application to Copilot outputs.
- 149. Design a Copilot change management and ROI measurement strategy for enterprise adoption.

### Lesson 7.1 — Licensing and Subscription Requirements

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Microsoft 365 Copilot requires a qualifying Microsoft 365 base license plus the Copilot add-on. As of 2026, the primary licensing tiers are:

| License SKU                      | Target Audience                       | Key Copilot Features                                             |
|----------------------------------|---------------------------------------|------------------------------------------------------------------|
| Microsoft 365 Copilot (Standard) | Enterprise M365 E3/E5 users           | Full Copilot in all M365 apps, Copilot Chat (Work mode), Agents  |
| Microsoft 365 Copilot Business   | SMB organizations under 300 users     | Core Copilot features with simplified admin; lower per-seat cost |
| Copilot Studio (add-on)          | Developers and admins building agents | Full Copilot Studio authoring; additional message capacity       |

| License SKU                | Target Audience           | Key Copilot Features                                              |
|----------------------------|---------------------------|-------------------------------------------------------------------|
| Microsoft Security Copilot | Security Operations teams | Security-specific AI agents; Defender, Entra, Purview integration |
| GitHub Copilot             | Developers                | Code completion, review, documentation, CLI assistance            |

## Lesson 7.2 — Admin Center Controls: Enabling, Restricting, and Monitoring Copilot

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Microsoft 365 administrators manage Copilot through the **Microsoft 365 Admin Center** ([admin.microsoft.com](https://admin.microsoft.com)) and through **Agent 365** — the governance control plane for agents. Key administrative controls include:

- **License Assignment:** Assign or remove Copilot licenses to specific users or groups from the Admin Center's Active Users panel.
- **Copilot Feature Controls:** Enable or disable specific Copilot features (e.g., Copilot in Teams, Copilot in Outlook) at the tenant or group level via Microsoft 365 admin settings.
- **Agent Governance (Agent 365):** Register, authorize, monitor, and restrict agents. Assign agent identities; apply least-privilege access. View agent activity logs and telemetry.
- **Usage Analytics:** Monitor Copilot adoption via the Microsoft 365 Admin Center's Copilot Usage Report — showing active users, feature engagement rates, and app-level adoption metrics.
- **Copilot Pages and Outputs:** Configure retention and labeling policies for Copilot Pages and agent-generated documents.

## Lesson 7.3 — Data Residency, Privacy, and Microsoft Purview Integration

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Microsoft provides the following data protection guarantees for Microsoft 365 Copilot:

- **Data is not used for model training:** Prompts, responses, and organizational content processed by Copilot are never used to train public AI models.
- **Data stays in your tenant:** All Copilot processing occurs within the Microsoft 365 trust boundary. Organizational data does not leave your tenant.
- **Data residency:** Copilot processes data in the same geographic region as your existing Microsoft 365 data residency configuration.
- **Existing access controls apply:** Copilot surfaces only content the user is authorized to access. It cannot circumvent SharePoint permissions, sensitivity labels, or Azure AD group policies.

**Microsoft Purview Integration:** Purview sensitivity labels applied to source documents are inherited by Copilot-generated outputs based on those documents. Purview audit logs capture all Copilot interactions for compliance and eDiscovery purposes. Data Loss Prevention (DLP) policies can restrict Copilot from including protected data categories in its responses.

## Lesson 7.4 — Security Copilot Agents: Threat Detection with Microsoft Defender and Entra

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**Microsoft Security Copilot** is a separate AI security platform that brings generative AI to Security Operations Center (SOC) workflows. Integrated with Microsoft Defender XDR, Microsoft Entra ID, Microsoft Purview, and Microsoft Sentinel, Security Copilot enables:

- Natural-language investigation of security incidents: *"Walk me through the attack chain for Incident #4872."*
- Automated threat hunting across endpoint, identity, email, and cloud signals.
- Vulnerability assessment and remediation guidance.

- Identity risk analysis: Copilot in Entra flags risky sign-ins and suggests conditional access policy improvements.
- Incident response playbook automation: Security agents execute predefined response workflows autonomously.

## Lesson 7.5 — Governance Best Practices

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An effective Copilot governance framework includes the following components:

150. **Acceptable Use Policy (AUP):** Define permitted and prohibited Copilot use cases. Address: data input restrictions, content review requirements, disclosure obligations, and prohibited automation scenarios.
151. **Sensitivity Labels:** Apply Microsoft Purview sensitivity labels to Copilot output categories based on data classification. Require review before sharing Copilot-generated content that references confidential or highly confidential source material.
152. **Audit Log Review:** Schedule regular review of Copilot audit logs in the Microsoft Purview Compliance Portal to identify anomalous usage patterns or potential policy violations.
153. **Agent Governance (Agent 365):** Maintain an agent registry; audit agent permissions quarterly; remove unused agents; validate that all deployed agents adhere to the organization's data access and action scope policies.
154. **User Training:** All Copilot users should complete at minimum the Foundations module of this course before gaining production access.

## Lesson 7.6 — Change Management: Driving Adoption and Measuring ROI

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Technology without adoption delivers no value. Effective Copilot change management follows a structured framework:

| Phase           | Activities                                                                    | Success Metrics                                                           |
|-----------------|-------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| Awareness       | Executive sponsorship, all-hands communications, Copilot demo events          | Awareness survey score >70%                                               |
| Enablement      | Role-based training, this course, prompt libraries, champion networks         | Training completion rate >80%                                             |
| Adoption        | Copilot Scenarios Library deployment, department-specific use case pilots     | Weekly active users as % of licensed seats                                |
| Optimization    | Feedback loops, advanced training, agent deployment for high-impact workflows | Time-to-task reduction metrics; agent-assisted task volume                |
| ROI Measurement | Productivity surveys, time-saved analysis, output quality assessments         | Documented hours saved per user per week; revenue-generating applications |

## Hands-On Lab 7: Admin Center Configuration and Compliance Review

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155. Log in to the M365 Admin Center using your lab administrator credentials.
156. Navigate to Settings > Copilot. Review the tenant-level Copilot enablement settings. Disable Copilot in a specific test security group to simulate a restricted-access policy.
157. Navigate to the Copilot Usage Report. Document the current active user count and top 3 Copilot features by engagement.
158. In Microsoft Purview Compliance Portal, apply a "Confidential – Internal Use Only" sensitivity label to a test Copilot-generated document.
159. Review the Copilot audit log in Purview for the past 7 days. Identify and document 3 Copilot interaction records.
160. Submit a 1-page governance summary documenting your findings and 2 policy recommendations based on the audit log review.

## Module 7 Compliance Assessment (Scenario-Based)

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161. An employee uses Copilot in Work mode to draft a document that references a file labeled "Highly Confidential - Customer Data." Copilot generates a draft. What should happen next according to governance best practices?

- A) The document should be shared immediately as Copilot output is always safe B) The employee should review and apply an appropriate sensitivity label before sharing C) The document should be deleted immediately D) The employee should submit a security ticket

**Answer: B**

162. Which Microsoft Purview capability automatically applies data classification to Copilot-generated documents based on the sensitivity of the source material?

- A) Audit Logs B) Sensitivity Labels C) DLP Policies D) Compliance Score

**Answer: B**

163. A department head asks you to allow a vendor-built Copilot agent to access the organization's confidential HR SharePoint library. What is the correct first step?

- A) Approve access immediately as agents are safe by default B) Review the agent's permissions scope in Agent 365 and apply least-privilege access controls before approval C) Deny all third-party agent access by policy D) Create a new SharePoint site for the agent

**Answer: B**

164. How does Microsoft guarantee that organizational data entered into Copilot will not be used to train public AI models?

- A) Through a contractual promise only B) Through technical architecture that keeps Copilot processing within the tenant boundary, backed by Microsoft's Data Protection Agreement C) By requiring users to opt out

individually D) By anonymizing all data before processing

**Answer: B**

165. Which metric is most directly relevant to measuring the productivity ROI of Microsoft 365 Copilot adoption?

A) Number of Copilot Chat sessions per day B) Average hours saved per user per week on specific task categories C) Number of agents deployed D) Copilot license cost per seat

**Answer: B**

## Module 7 Knowledge Check

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166. Where does an administrator go to view the Copilot Usage Report for a Microsoft 365 tenant?

A) Azure Portal B) Microsoft 365 Admin Center C) Copilot Studio D) Microsoft Purview Compliance Portal

**Answer: B**

167. Microsoft Security Copilot integrates with which Microsoft products for threat detection? (Select the best answer.)

A) Excel, Word, and Teams B) Microsoft Defender XDR, Microsoft Entra ID, and Microsoft Sentinel C) Power Automate and Power BI D) GitHub and Azure DevOps

**Answer: B**

168. What does it mean for an agent to operate under "least-privilege access" in Agent 365?

A) The agent can access all tenant data by default B) The agent is granted only the specific data access and action permissions required for its defined function C) The agent requires user confirmation for every action D) The agent is restricted to Web mode only

**Answer: B**

169. Which change management phase focuses on deploying role-specific use cases and building champion networks?

A) Awareness B) Enablement C) Adoption D) ROI Measurement

**Answer: C**

170. A user's existing SharePoint folder permissions mean they cannot view files in the "Executive Leadership" folder. If they prompt Copilot in Work mode to summarize those files, what will happen?

A) Copilot will summarize the files because it has elevated access B) Copilot will not surface or reference those files, as it respects existing access controls  
C) Copilot will prompt the user to request access D) Copilot will provide a partial summary with redacted sections

**Answer: B**

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The Complete Copilot Master Certification Course | 2026 Edition | Module 7

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## MODULE 8: Advanced Workflows, Automation, and Real-World Projects

Estimated Duration: 6 Hours | Includes Capstone Project & 1 Knowledge Check

The final module of the Copilot Master Certification Course challenges you to synthesize everything you have learned across the previous 7 modules into sophisticated, production-ready workflows. You will explore the full collaboration ecosystem — Power Automate, Viva, Loop, OneNote, and Copilot Notebooks — and complete your Capstone Project: the culminating demonstration of Copilot mastery.

## Module 8 Learning Objectives

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171. Design end-to-end AI-powered business workflows that integrate Copilot across multiple Microsoft 365 applications and external systems.

172. Build and test Power Automate flows that incorporate Copilot AI actions for intelligent process automation.
173. Apply Copilot in Microsoft Viva, Loop, and OneNote for collaborative knowledge management and organizational intelligence.
174. Use Copilot Notebooks to generate AI-powered document summaries, recommendations, and podcast-style audio recaps.
175. Evaluate Microsoft Copilot's strategic roadmap and articulate a personal and organizational strategy for sustained AI fluency.

## Lesson 8.1 — Building End-to-End AI-Powered Business Workflows

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Advanced Copilot practitioners do not use Copilot in isolated applications — they architect workflows that chain Copilot capabilities across the Microsoft 365 stack to transform entire business processes. Principles for workflow design:

- **Identify the highest-friction stages:** Map a business process and pinpoint where the most time is consumed by manual, repetitive, or knowledge-intensive tasks.
- **Match Copilot capability to task:** Use the right Copilot surface for each task stage (Teams for meeting intelligence, Word for document generation, Excel for analysis, Outlook for communication).
- **Design human checkpoints:** Define where human review and approval are mandatory — particularly for outputs that will be shared externally or used in consequential decisions.
- **Document the prompt library:** Every production workflow should have a curated set of tested prompts for each Copilot interaction in the workflow, ensuring consistent, repeatable results.

## Lesson 8.2 — Power Automate + Copilot: Automating Repetitive Processes

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**Microsoft Power Automate** is the workflow automation platform of the Microsoft 365 suite. Copilot is deeply integrated into Power Automate in two ways:

176.      **Copilot in Power Automate (Authoring):** Describe a workflow in plain English — *"When a new row is added to my Excel sales tracker, send me a Teams notification and draft a follow-up email for that lead"* — and Copilot automatically builds the flow, selecting triggers, actions, and connections.
177.      **AI Builder Actions in Flows:** Incorporate Copilot AI actions directly into Power Automate flows — including text summarization, sentiment analysis, document classification, and AI-generated content insertion — enabling intelligent automation of document processing, approvals, and communications.

Combined, Power Automate and Copilot enable organizations to automate entire process chains that previously required both technical development resources and manual AI tasks — from invoice processing to customer onboarding to content moderation.

## Lesson 8.3 — Copilot in Viva, Loop, and OneNote

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**Microsoft Viva:** Copilot in Viva Engage and Viva Insights surfaces organizational communication trends, highlights employee engagement signals, and generates leadership communication drafts. Copilot in Viva Learning recommends personalized training content based on role, skills gaps, and organizational learning goals.

**Microsoft Loop:** Loop components are collaborative, real-time content blocks that live across Microsoft 365 (Teams, Outlook, OneNote, SharePoint). Copilot in Loop can draft Loop components, summarize component content, and generate structured tables or task lists that update in real-time wherever the component is embedded.

**OneNote:** Copilot in OneNote can summarize entire notebooks or sections, extract action items from meeting notes, reorganize content for clarity, and generate new content based on existing notes — making OneNote a powerful organizational knowledge base when combined with Copilot.

## Lesson 8.4 — Copilot Notebooks: AI-Generated Summaries, Recommendations, and Podcast-Style Recaps

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**Copilot Notebooks** in Microsoft 365 Copilot allow you to compile content from multiple sources — documents, emails, web pages, files — into a unified workspace where Copilot then generates: a structured written summary, a set of key insights and recommendations, a FAQ based on the compiled content, and a **podcast-style audio recap** — a conversational, AI-narrated audio summary of the notebook content.

Copilot Notebooks are particularly valuable for: rapid research briefings before high-stakes meetings, onboarding new team members to complex projects, creating shareable knowledge packages for stakeholders, and consuming long-form research content efficiently in audio format during commutes or travel.

## Lesson 8.5 — The Future of Copilot: Roadmap, Multimodel Strategy, and Continuous AI Evolution

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Microsoft's Copilot roadmap reflects three strategic directions that will shape the platform through the late 2020s:

178.     **Deeper Agentic Capability:** Autonomous agents will become more capable, longer-running, and more deeply integrated with enterprise systems — moving from assistance to execution across increasingly complex business domains.
179.     **Multimodel Architecture:** Copilot will continue to evolve as a model-agnostic orchestration layer, incorporating the best available models — regardless of provider — for each specific task. This gives organizations

access to frontier AI advances without being locked into a single model vendor.

180.      **AI-Native Workplace:** The distinction between "using Copilot" and "doing your job" will continue to blur. AI fluency — the ability to frame problems, craft effective prompts, evaluate AI outputs, and design AI-augmented workflows — will become a core competency evaluated in hiring, performance management, and professional development.



### Preparing for Continuous Evolution

Microsoft releases Copilot updates and new features on a continuous basis. Copilot Master Certified professionals should: subscribe to the Microsoft 365 Message Center, follow the Microsoft 365 Copilot Blog, join the Microsoft Tech Community Copilot forum, complete the annual CMC renewal module, and maintain a personal prompt library that evolves with new capabilities.

## Module 8 Capstone Project: Design a Copilot-Powered Business Workflow

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**Objective:** Demonstrate mastery of Microsoft 365 Copilot by designing and documenting a complete, production-ready Copilot-powered workflow for a real or simulated business function.

### Capstone Deliverables (All Required)

181.      **Workflow Diagram:** A visual map of the end-to-end workflow — showing each process stage, which Copilot surface is used at each stage, the data inputs and outputs, human review checkpoints, and integration touchpoints with external systems. Create in Visio, PowerPoint, or a comparable tool.
182.      **Prompt Library:** A curated library of 10–15 production-ready prompts covering every Copilot interaction in the workflow. Each prompt must include:

the target app/surface, the full prompt text (CPCOF structured), expected output description, and 1–2 tips for refinement.

183.     **Agent Configuration Plan:** If the workflow includes one or more Copilot agents, document: agent type, system instructions, knowledge sources, action connections, publishing channel, and governance considerations (data access scope, sensitivity labels, escalation triggers).
184.     **2-Page Executive Summary:** A professional executive summary written using Copilot in Word, summarizing the workflow's business purpose, the Copilot capabilities utilized, the expected productivity impact (quantified where possible), implementation requirements, and governance considerations. Suitable for presentation to organizational leadership.

## Suggested Capstone Scenarios

- Employee Onboarding: From offer letter to Day 30 check-in, fully Copilot-assisted.
- Sales Pipeline Management: Lead qualification through proposal delivery using Copilot + agents.
- Content Production: Blog post to social media to email campaign using cross-app Copilot workflow.
- Contract Review and Approval: Copilot-assisted legal document review, redlining, and approval routing.
- Customer Support Escalation: Copilot-powered triaging, knowledge retrieval, and resolution drafting.
- **Custom:** Propose your own workflow relevant to your organization or industry (requires instructor pre-approval).

## Capstone Grading Rubric

| Deliverable                                            | Max Points | Pass Threshold |
|--------------------------------------------------------|------------|----------------|
| Workflow Diagram (completeness, clarity, logical flow) | 25         | 18/25          |

| Deliverable                                                | Max Points | Pass Threshold      |
|------------------------------------------------------------|------------|---------------------|
| Prompt Library (quality, CPCOF structure, coverage)        | 25         | 18/25               |
| Agent Configuration Plan (depth, governance alignment)     | 25         | 18/25               |
| Executive Summary (professionalism, impact quantification) | 25         | 18/25               |
| <b>Total</b>                                               | <b>100</b> | <b>70/100 (70%)</b> |

## Module 8 Knowledge Check

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185. When building a Power Automate flow using Copilot, the most effective starting point is to:

- A) Manually configure each trigger and action
- B) Describe the desired workflow in plain English to Copilot, which then builds the flow automatically
- C) Import a pre-built template from GitHub
- D) Use Python to script the flow logic

**Answer: B**

186. Copilot Notebooks' podcast-style recap feature generates:

- A) A video presentation of document content
- B) A conversational, AI-narrated audio summary of compiled notebook content
- C) A live Teams call with Copilot
- D) A PDF export of the notebook

**Answer: B**

187. Microsoft's multimodel strategy for Copilot means that:

- A) Copilot only uses Microsoft-developed AI models
- B) Copilot selects the best available AI model for each task, regardless of the model provider
- C) Users can choose which AI model to use for each prompt
- D) Copilot switches between models based on user subscription level

**Answer: B**

188. In the context of AI-powered workflow design, what is the purpose of a human checkpoint?

- A) To slow down the workflow for compliance purposes B) To define stages where mandatory human review and approval occur before the workflow proceeds C) To replace the Copilot prompt with a human-written one D) To log all Copilot outputs in a compliance database

**Answer: B**

189. Which of the following is NOT listed as a required Capstone Project deliverable?

- A) Workflow Diagram B) Prompt Library C) Agent Configuration Plan D) A recorded video presentation

**Answer: D**

## Assessments & Grading Framework

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### Assessment Types

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The course uses a multi-modal assessment strategy to evaluate learner mastery across cognitive levels — from knowledge recall through applied creation — aligned with the course's Bloom's Taxonomy learning objectives.

| Assessment Type         | Format                                 | Grading Method                | Frequency                          |
|-------------------------|----------------------------------------|-------------------------------|------------------------------------|
| Module Knowledge Checks | 5 multiple-choice questions per module | Auto-graded (LMS)             | Once per module (8 total)          |
| Hands-On Lab Rubrics    | Instructor-reviewed lab deliverables   | Graded rubric (4-point scale) | 5 graded labs (Modules 3, 4, 5, 6, |

| Assessment Type          | Format                                 | Grading Method                      | Frequency       |
|--------------------------|----------------------------------------|-------------------------------------|-----------------|
|                          |                                        |                                     | 7)              |
| Prompt Rewrite Workshop  | Written prompt improvements (Module 2) | Peer review + instructor spot-check | Once (Module 2) |
| Compliance Scenario Quiz | 5 scenario-based questions (Module 7)  | Auto-graded (LMS)                   | Once (Module 7) |
| Capstone Project         | 4-deliverable project (Module 8)       | Instructor-graded rubric (100 pts)  | Once (Module 8) |

## Scoring Table

| Assessment                                       | Max Points     | Weight | Passing Threshold             |
|--------------------------------------------------|----------------|--------|-------------------------------|
| Module 1 Knowledge Check                         | 100            | 5%     | 70%                           |
| Module 2 Knowledge Check                         | 100            | 5%     | 70%                           |
| Module 3 Knowledge Check + Lab Rubric            | 100 + 20       | 8%     | 70% (check) / 60% (lab)       |
| Module 4 Knowledge Check + Lab Rubric            | 100 + 20       | 8%     | 70% (check) / 60% (lab)       |
| Module 5 Knowledge Check + Lab Rubric            | 100 + 20       | 8%     | 70% (check) / 60% (lab)       |
| Module 6 Knowledge Check + Lab Rubrics (2)       | 100 + 40       | 10%    | 70% (check) / 60% each (labs) |
| Module 7 Knowledge Check + Compliance Quiz + Lab | 100 + 100 + 20 | 10%    | 70% (each)                    |
| Module 8 Knowledge Check                         | 100            | 5%     | 70%                           |
| Capstone Project                                 | 100            | 30%    | 70%                           |
| Prompt Rewrite Workshop (Module                  | Pass/Fail      | 11%    | Pass required                 |

| Assessment                  | Max Points | Weight      | Passing Threshold  |
|-----------------------------|------------|-------------|--------------------|
| 2)                          |            |             |                    |
| <b>Overall Course Score</b> | <b>—</b>   | <b>100%</b> | <b>75% overall</b> |

## Grading Scale

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| Score Range | Grade           | Certification Status                            |
|-------------|-----------------|-------------------------------------------------|
| 90–100%     | Distinction     | Copilot Master Certification — with Distinction |
| 80–89%      | Pass with Merit | Copilot Master Certification — with Merit       |
| 75–79%      | Pass            | Copilot Master Certification                    |
| 70–74%      | Near Pass       | No certification; targeted retake recommended   |
| Below 70%   | Not Yet Passed  | Full course retake or component retake required |

## Retake Policy

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- **Module Knowledge Checks:** Learners may retake each knowledge check up to 2 times. A 48-hour waiting period is required between attempts.
- **Compliance Scenario Quiz (Module 7):** May be retaken once after instructor review session.
- **Hands-On Lab Rubrics:** Each lab may be resubmitted once with incorporated instructor feedback. Final resubmission grade applies.
- **Capstone Project:** Learners who do not pass the capstone on first submission may resubmit once following a mandatory instructor feedback session. Resubmissions must be submitted within 30 days of the original feedback.

- **Overall Course Retake:** Learners who do not reach the 75% overall threshold after all retake opportunities may re-enroll in the full course with a 6-month waiting period.

## Certification Criteria & Badge

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### **Copilot Master Certification (CMC)**

The **Copilot Master Certification (CMC)** is the premier professional credential for Microsoft 365 Copilot practitioners. CMC holders have demonstrated comprehensive knowledge and applied skill across the full Copilot platform — from foundational AI concepts through agentic workflows, enterprise administration, and real-world project execution.

The CMC badge is issued digitally via **Credly** and is shareable directly to LinkedIn, email signatures, and professional portfolios. Each badge is cryptographically verified and links to the holder's verified credential record.

## Requirements to Earn the Copilot Master Certification

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To be awarded the CMC badge, all of the following requirements must be met within a single enrollment period (18 months from enrollment date):

| Requirement                   | Standard                        | Status Tracking         |
|-------------------------------|---------------------------------|-------------------------|
| Complete all 8 course modules | 100% lesson completion required | LMS completion tracking |

| Requirement                                       | Standard                                   | Status Tracking                       |
|---------------------------------------------------|--------------------------------------------|---------------------------------------|
| Pass all 8 module knowledge checks                | ≥70% per knowledge check                   | Auto-graded; tracked in LMS gradebook |
| Submit and pass all 5 graded hands-on lab rubrics | ≥60% on each rubric (12/20 points minimum) | Instructor-graded; results in LMS     |
| Pass the Module 7 Compliance Scenario Assessment  | ≥70%                                       | Auto-graded                           |
| Complete and pass the Capstone Project            | ≥70% (70/100 points)                       | Instructor-graded rubric              |
| Achieve overall course score                      | ≥75%                                       | Calculated in LMS gradebook           |

## Badge Details

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- **Badge Name:** Copilot Master Certification (CMC) — 2026
- **Issuing Platform:** Credly (or equivalent verifiable digital badge platform)
- **Badge URL:** Unique, verifiable credential URL provided upon award
- **LinkedIn Integration:** One-click share to LinkedIn profile; displayed under "Licenses & Certifications"
- **Metadata:** Badge includes: earning criteria, issue date, expiration date, issuing organization, and verification link
- **Validity Period:** 2 years from date of award

## Certification Renewal

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The Copilot platform evolves rapidly. To maintain the relevance and integrity of the CMC credential, renewal is required every 2 years. The renewal process consists of:

190. Completing the **CMC Annual Refresher Module** — a 1-module course covering all major Copilot platform updates from the past 2 years (estimated 4 hours).

191. Passing the Refresher Module Knowledge Check ( $\geq 70\%$ ).
192. Submitting a short renewal project: a 1-page brief documenting one new Copilot capability introduced since the original certification and its application to a real or simulated business scenario.

## Certification Levels

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The CMC program offers a structured progression pathway for learners at different stages of their Copilot journey:

| Level | Certification Name                        | Requirements                                                                          | Target Audience                                                                                                |
|-------|-------------------------------------------|---------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| 1     | <b>Copilot Foundations Certificate</b>    | Complete Modules 1-2; Pass both knowledge checks; Pass Lab 1                          | New Copilot users; general business professionals beginning their AI journey                                   |
| 2     | <b>Copilot Practitioner Certificate</b>   | Complete Modules 1-5; Pass all 5 knowledge checks; Pass Labs 1-3; Overall $\geq 70\%$ | Knowledge workers and productivity-focused professionals proficient in Copilot across M365 apps                |
| 3     | <b>Copilot Master Certification (CMC)</b> | Complete full course (Modules 1-8); Meet all requirements above                       | Advanced practitioners, IT administrators, enterprise trainers, Copilot champions, and AI transformation leads |

### Career Impact of the CMC

Copilot Master Certified professionals are positioned for roles including: AI Transformation Lead, Microsoft 365 Copilot Champion, Enterprise Learning & Development Specialist, IT Administrator (AI Focus), Copilot Solutions Architect, and Digital Productivity Consultant. The CMC badge signals to employers that

the holder can drive measurable, governed AI adoption at enterprise scale.

## Appendix A: Recommended Resources

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### Microsoft Official Resources

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- **Microsoft Learn — Copilot Learning Paths:** [learn.microsoft.com/copilot](https://learn.microsoft.com/copilot) — Free, official, frequently updated learning modules for all Copilot surfaces.
- **Microsoft 365 Copilot Documentation:** [learn.microsoft.com/microsoft-365-copilot](https://learn.microsoft.com/microsoft-365-copilot) — Technical reference documentation for administrators and developers.
- **Microsoft Copilot Release Notes:** Available in the Microsoft 365 Admin Center Message Center and at [learn.microsoft.com/copilot/releases](https://learn.microsoft.com/copilot/releases).
- **Microsoft Copilot Scenario Library:** [adoption.microsoft.com/copilot-scenario-library](https://adoption.microsoft.com/copilot-scenario-library) — 100+ pre-built business scenario prompts organized by industry and function.
- **Microsoft Copilot Blog:** [techcommunity.microsoft.com/copilot](https://techcommunity.microsoft.com/copilot) — Official Microsoft announcements, feature spotlights, and customer success stories.
- **Microsoft Tech Community — Copilot Forum:** Community Q&A, peer discussion, and expert response for Copilot technical questions.

## Recommended Books and Publications

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- *The AI-Augmented Enterprise* — Frameworks for deploying AI at scale in modern organizations; relevant to Modules 7 and 8.
- *Prompt Engineering for Business Professionals* — Practical prompt design techniques extending the CPCOF framework (Modules 2-5).
- *Microsoft 365 Administrator's Guide to AI Governance* — Deep-dive technical reference for Module 7 practitioners.
- Harvard Business Review — AI in the Workplace series: [hbr.org/topic/artificial-intelligence](https://hbr.org/topic/artificial-intelligence)

## YouTube Channels and Video Resources

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- **Microsoft 365 YouTube Channel:** Official product demos, feature walkthroughs, and Ignite/Build session recordings.
- **Microsoft Copilot YouTube Playlist:** Curated tutorials for each Copilot surface updated with each major release.
- **Microsoft Mechanics:** In-depth technical demonstrations of Copilot architecture and administration.

## Communities and Ongoing Learning

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- Microsoft Copilot Adoption Hub: [adoption.microsoft.com/copilot](https://adoption.microsoft.com/copilot)
  - LinkedIn Learning — Microsoft Copilot courses (multiple current offerings)
  - Microsoft Partner Network — Copilot training resources for partners and resellers
  - Local Microsoft User Groups (MUGs) — Community-led learning events
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# Appendix B: Prompt Library — 30

## Production-Ready Prompts

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The following prompts are organized by application and use case. Each prompt is structured using the CPCOF framework and includes usage notes. Adapt placeholders in [brackets] to your specific context.

### Copilot Chat Prompts

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#### **COPILOT CHAT**

##### Executive Research Brief

You are a senior business analyst. Research [topic or company name] and produce a structured brief covering: (1) overview, (2) key recent developments, (3) competitive positioning, (4) strategic implications for [your industry]. Limit to 500 words. Format with bold section headers and bullet points.

*Tip: Use Web mode for external research; switch to Work mode to cross-reference internal documents.*

## COPILLOT CHAT

### Meeting Pre-Brief Synthesis

I have a meeting with [name/team] in [timeframe] about [topic]. Summarize all recent communications, documents, and activity related to this topic from the past [30 days]. Highlight any open questions, decisions pending, and commitments made. Format as a 1-page briefing note.

*Tip: Use Work mode. The more specific the topic and timeframe, the more focused the results.*

## COPILLOT CHAT

### Strategic Options Analysis

Act as a strategy consultant. I need to evaluate [decision or challenge]. Generate 3 distinct strategic options. For each option, provide: a 2-sentence description, 3 pros, 3 cons, implementation complexity (Low/Medium/High), and estimated time to value. Present in a structured table.

*Tip: Follow up with "Now recommend the option most appropriate for a [company size/risk profile] organization and explain your reasoning."*

## COPILOT CHAT

### Copilot Pages Compilation

I have conducted research on [topic] across [number] sessions. Compile the key findings into a structured knowledge page with: (1) Executive Summary, (2) Key Findings by Category, (3) Open Questions, (4) Recommended Next Steps. Format for sharing with a senior leadership audience.

*Tip: Use the Edit in Pages button to save this as a persistent, shareable Copilot Page immediately.*

## COPILOT CHAT

### Scenario Planning

Using chain-of-thought reasoning, analyze [business situation or trend] and generate 3 plausible future scenarios for [2-year timeframe]: Best Case, Base Case, and Worst Case. For each scenario: describe the trigger conditions, organizational impact, and 2 recommended proactive actions. Present as a formatted scenario planning table.

*Tip: Especially effective in Web mode for macro trend analysis; combine with*

*Work mode for internal context.*

## Microsoft Word Prompts

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### WORD

#### Business Proposal Draft

Using the attached brief [reference file], draft a professional 4-section business proposal: (1) Executive Summary, (2) Problem Statement and Proposed Solution, (3) Approach and Timeline, (4) Investment and ROI. Tone: confident and consultative. Length: approximately 1,000 words. Include a compelling opening sentence.

*Tip: After the initial draft, prompt: "Rewrite the Executive Summary to be more compelling for a CFO audience, emphasizing cost reduction and risk mitigation."*

### WORD

#### SOP Generation

Act as a technical writer. Convert the following process description into a formal Standard Operating Procedure (SOP) document with: Purpose, Scope, Roles and Responsibilities, Prerequisites, Step-by-Step Procedure

(numbered), Quality Checkpoints, and Revision History table. Process description: [paste process description].

*Tip: Reference an existing SOP from your SharePoint library as a formatting template to ensure style consistency.*

#### WORD

##### Document Tone Transformation

Rewrite the selected text [or: the Executive Summary section of this document] for a frontline employee audience. Requirements: plain English (8th grade reading level), no jargon, warm and encouraging tone, active voice, sentences under 20 words. Maintain all factual content and key messages.

*Tip: Select only the specific section you want transformed before opening Copilot to apply the transformation with precision.*

#### WORD

##### Executive Summary from Long Report

Summarize this document [or: the attached report] into a 1-page executive summary. Include: (1) 3-sentence situation overview, (2) 3–5 key findings as bullets, (3) top recommendation with rationale, (4) proposed next steps. Audience: C-suite executives with 2 minutes to read. Avoid technical detail.

*Tip: After generating, prompt Copilot to "Add a one-sentence headline at the top that captures the single most important message from this report."*

#### WORD

##### RFP Response Section Draft

Using [reference document 1: company capability deck] and [reference document 2: past RFP response], draft a response to the following RFP question: "[Paste RFP question]." Requirements: direct, evidence-based, professional tone, maximum 400 words, aligned with evaluation criteria: [paste criteria].

*Tip: Run Agent Mode for multi-section RFP responses to maintain consistency across all sections simultaneously.*

## Microsoft Excel Prompts

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## EXCEL

### Revenue Trend Analysis

Analyze this sales data table. Identify: (1) top 5 products by total revenue, (2) month with highest growth rate, (3) any products showing 3+ consecutive months of decline, (4) regions with below-average performance. Present findings as a bulleted insight summary and suggest 2 follow-up analyses I should run.

*Tip: Ensure your data is formatted as a Table (Ctrl+T) before opening the Copilot pane for best results.*

## EXCEL

### Formula Builder

Write an Excel formula that calculates the [rolling 3-month average / year-over-year growth rate / profit margin] for each row in column [X], where revenue is in column [B] and cost is in column [C]. Explain the formula in plain English after providing it.

*Tip: Ask Copilot to insert the formula directly into a new column rather than just explaining it — it will create a suggested column automatically.*

## EXCEL

### Dashboard PivotTable

Create a PivotTable showing total [sales / revenue / units] grouped by [Region] in rows and [Product Category] in columns, with [Quarter] as a slicer filter. After creating the PivotTable, add a clustered bar chart visualization sorted by total value descending. Apply a professional color theme.

*Tip: Follow up with "Add conditional formatting to the PivotTable to highlight cells where values exceed the average by more than 20%."*

## EXCEL

### Data Anomaly Detection

Review this dataset for anomalies. Identify: any values more than 2 standard deviations from the column mean, duplicate entries in the [ID/Name] column, missing values in required fields, and any date values outside the expected range of [Jan 2025 – Jun 2026]. Highlight all anomalies and provide a summary count by type.

*Tip: For large datasets, ask Copilot to use Python in Excel for the statistical*

*anomaly detection — it handles larger volumes more reliably.*

## EXCEL

### Insight Narrative

Based on this sales data and the PivotTable I have created, write a 3-paragraph narrative summary suitable for including in a management report. Paragraph 1: overall performance vs. target. Paragraph 2: top performers and key drivers. Paragraph 3: areas of concern and recommended focus for next quarter.

*Tip: Copy the Copilot-generated narrative and paste it into a Word document to build the narrative portion of your management report seamlessly.*

## Outlook Prompts

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## OUTLOOK

### Executive Update Email

Draft an email from me to [recipient name / role] providing a weekly project status update for [project name]. Include: RAG status (Red/Amber/Green), 3 accomplishments this week, 2 risks or blockers with proposed

mitigations, and key deliverables for next week. Tone: professional, concise, direct. Target length: 250 words.

*Tip: Use Coaching after the draft is generated to check that the tone is appropriate for the recipient's seniority level.*

## OUTLOOK

### Thread Summarization

Summarize this email thread. Identify: (1) the core issue or question being discussed, (2) key positions or perspectives from each participant, (3) any decisions made or agreed, (4) outstanding open items requiring resolution. Present as a structured brief I can share with a stakeholder who hasn't been on the thread.

*Tip: Effective for threads with 10+ messages — particularly when returning from leave or joining a project mid-stream.*

## OUTLOOK

### Difficult Communication

Draft an email communicating [challenging news: delay / decision reversal / resource reduction] to [audience]. The email must: acknowledge the impact empathetically, explain the rationale clearly without over-apologizing, outline the path forward with concrete next steps, and close on a constructive note. Tone: honest, respectful, and forward-looking.

*Tip: After drafting, prompt Copilot to "Check the tone of this email — is it too apologetic or too abrupt? Suggest improvements."*

## Microsoft Teams Prompts

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### TEAMS

#### Meeting Action Items

From the transcript/recap of this meeting, extract all action items. For each, provide: (1) the action item description, (2) the owner (if identified), (3) the due date (if mentioned), (4) any dependencies or blockers noted. Present as a structured table. Flag any items where ownership was unclear as "[Owner TBD]."

*Tip: After extracting action items, ask Copilot to format them as a numbered task list you can paste directly into a Teams channel post or Loop component.*

## TEAMS

### Channel Catch-Up

Summarize all activity in this Teams channel from the past [7 days / 2 weeks / 1 month]. Identify: (1) major topics discussed, (2) decisions made, (3) questions raised but not yet resolved, (4) key contributors and their main points. Present as a structured briefing note I can review in under 3 minutes.

*Tip: Available directly in the Teams channel via the Copilot icon at the top of the channel view. Especially valuable after extended absence.*

## Copilot Agents Prompts

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## AGENTS

### Researcher Agent — Competitive Analysis

[Activate the Researcher Agent.] Produce a competitive analysis of [3 named competitors] in the [industry] market. For each competitor, cover: market position, AI product strategy, pricing model, key strengths, and vulnerabilities. Synthesize with a comparison table and 3 strategic recommendations for our organization. Cite sources for all factual claims.

*Tip: Allow the Researcher Agent to complete its research plan fully before reviewing; interrupt only if it pursues an off-scope direction.*

## AGENTS

### Analyst Agent — Financial Insights

[Activate the Analyst Agent.] Analyze the attached financial dataset. Produce: (1) a written executive summary of financial performance vs. prior period, (2) identification of the top 3 variance drivers (positive and negative), (3) 2 forward-looking risk factors visible in the data trends, (4) a visualization recommendation for leadership presentation. Quantify all findings.

*Tip: Review the Analyst Agent's intermediate steps and provide steering if it focuses on unexpected aspects of the data.*

## AGENTS

### Custom Agent — HR Policy FAQ

[Custom HR Agent System Instruction:] You are a knowledgeable, professional HR Policy Assistant for [Company Name]. You have access to

the company's HR policy library in [SharePoint location]. Answer employee policy questions accurately and empathetically. If a question falls outside your knowledge base, say: "I recommend contacting HR directly at [hr@company.com] for this question."

*Tip: This is a system instruction template for Copilot Studio. Test with 10 policy questions before publishing to verify grounding accuracy.*

## AGENTS

### Copilot Cowork — Project Deliverable

[Copilot Cowork delegation:] I need you to prepare a comprehensive 10-page research report on [topic]. The report should include: executive summary, market analysis, technology landscape, competitive dynamics, regulatory environment, and strategic implications. Use both internal documents [reference files] and credible external sources. Notify me at each major section completion for review.

*Tip: Set clear review checkpoints and respond to Copilot's progress updates promptly to keep the Cowork task on track.*

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## Appendix C: Glossary of Key Terms

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| Term                              | Definition                                                                                                                                                                                                                     |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Agent</b>                      | A configured AI system that combines an LLM with instructions, knowledge sources, and action capabilities to autonomously fulfill a defined function — from simple Q&A to complex multi-step workflow execution.               |
| <b>Agent 365</b>                  | Microsoft's tenant control plane for discovering, authorizing, monitoring, and governing AI agents at enterprise scale. Allows IT to treat agents as identity-bound directory objects with auditable behaviors.                |
| <b>Agent Mode</b>                 | A capability in Microsoft Word and other M365 apps that enables Copilot to operate as a multi-step collaborator, executing a sequence of actions (research, drafting, review, revision) in a single orchestrated session.      |
| <b>Agent Store</b>                | A governed catalog within Microsoft 365 providing access to first-party Microsoft agents, partner-built agents, and custom organizational agents. Access is controlled by tenant administrators.                               |
| <b>Analyst Agent</b>              | A Microsoft-built autonomous Copilot agent designed for end-to-end data analysis. Accepts a high-level analytical objective and autonomously runs multiple analyses, generates charts, and produces narrative insight reports. |
| <b>Computer-Using Agent (CUA)</b> | A type of Copilot agent that interacts directly with website and desktop application user interfaces, enabling automation of processes in systems that lack APIs. Generally available in Copilot Studio as of 2026.            |
| <b>Context Window</b>             | The maximum amount of text (measured in tokens) an LLM can process in a single interaction. Determines how much prior conversation, document content, or reference material Copilot can "see" at once.                         |

| Term                                | Definition                                                                                                                                                                                                                                                      |
|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Copilot Chat</b>                 | The central conversational AI interface in Microsoft 365 Copilot, available at <a href="https://copilot.microsoft.com">copilot.microsoft.com</a> and within M365 apps. Supports both Web mode (internet-grounded) and Work mode (organizational data-grounded). |
| <b>Copilot Cowork</b>               | A capability developed with Anthropic that enables Microsoft 365 Copilot to execute long-running, multi-step delegated tasks autonomously, with transparent progress and human steering checkpoints.                                                            |
| <b>Copilot Notebooks</b>            | A feature in Microsoft 365 Copilot that compiles content from multiple sources into a unified workspace, then generates a structured written summary, key insights, FAQ, and podcast-style audio recap.                                                         |
| <b>Copilot Pages</b>                | A feature in Copilot Chat that saves AI-generated responses as persistent, collaborative, editable documents — similar to Microsoft Loop pages — that can be shared across the organization.                                                                    |
| <b>Copilot Studio</b>               | Microsoft's low-code platform for building, testing, publishing, and governing custom Copilot agents. Supports declarative agent creation, knowledge source connection, topic design, action integration, and multi-channel publishing.                         |
| <b>CPCOF Framework</b>              | The prompt engineering framework taught in this course: Context, Persona, Constraints, Output, Format. Provides a repeatable structure for crafting high-quality Copilot prompts across all applications.                                                       |
| <b>Declarative Agent</b>            | A Copilot agent configured with specific instructions, knowledge sources, and conversation topics, designed to respond to user queries within a defined scope. Built in Copilot Studio without code.                                                            |
| <b>Facilitator Agent</b>            | A Microsoft-built Teams agent that operates during live meetings, providing real-time note-taking, surfacing relevant documents, answering participant questions via organizational data, and preparing Recap drafts.                                           |
| <b>Graph Data (Microsoft Graph)</b> | The data layer connecting all structured Microsoft 365 data — emails, calendars, files, contacts, meetings, tasks — accessible via the Microsoft Graph API and used by Copilot for Work mode grounding.                                                         |

| Term                                        | Definition                                                                                                                                                                                                                    |
|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Grounding</b>                            | The process of enriching a user's Copilot prompt with relevant organizational data (from the Microsoft Graph and Semantic Index) before sending to the LLM, improving response accuracy and relevance.                        |
| <b>Hallucination</b>                        | The tendency of LLMs to generate plausible-sounding but factually incorrect content. Grounding via RAG and organizational data sources significantly reduces hallucination risk in Copilot's Work mode.                       |
| <b>LLM (Large Language Model)</b>           | A neural network trained on vast text corpora to generate, summarize, translate, and reason with language at scale. The AI engine underlying Microsoft Copilot's language capabilities.                                       |
| <b>MCP (Model Context Protocol)</b>         | An emerging open standard enabling Copilot agents to connect to any MCP-compatible data source or tool, facilitating interoperability across AI ecosystems and enterprise applications.                                       |
| <b>Prompt Engineering</b>                   | The discipline of crafting effective AI prompts by selecting and structuring input text to guide an LLM toward producing high-quality, relevant, and appropriately formatted outputs.                                         |
| <b>Purview (Microsoft Purview)</b>          | Microsoft's unified data governance, risk, and compliance solution. Integrated with Copilot to provide sensitivity labeling of AI outputs, audit logging of Copilot interactions, and DLP policy enforcement.                 |
| <b>RAG (Retrieval-Augmented Generation)</b> | An AI architecture pattern in which relevant documents or data are retrieved and included in the context provided to an LLM before generation — improving factual accuracy and enabling domain-specific responses.            |
| <b>Researcher Agent</b>                     | A Microsoft-built autonomous Copilot agent that conducts deep research across internal and external sources, producing structured reports with citations. Ideal for competitive analysis, due diligence, and market research. |
| <b>Responsible AI</b>                       | Microsoft's framework of six principles governing ethical AI design and use: Fairness, Reliability & Safety, Privacy & Security, Inclusiveness, Transparency, and Accountability.                                             |

| Term                     | Definition                                                                                                                                                                                                                        |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Semantic Index</b>    | Microsoft's vector embedding layer for Microsoft 365 content that enables concept-level (semantic) search — allowing Copilot to find relevant content based on meaning rather than exact keyword matching.                        |
| <b>Sensitivity Label</b> | A Microsoft Purview classification tag applied to documents, emails, and Copilot outputs to indicate the data's sensitivity level and enforce appropriate access and handling controls.                                           |
| <b>Token</b>             | The basic unit of text processed by an LLM. Approximately 0.75 words per token in English. A model's context window is measured in tokens, determining how much input it can process simultaneously.                              |
| <b>Work IQ</b>           | Copilot's organizational intelligence and persistent memory layer, introduced at Microsoft Ignite 2025. Ingests email, files, meetings, and behavioral signals to build role-aware context that persists across Copilot sessions. |

# Appendix D: Lab Environment Setup Guide

 **Complete Before Module 1**

Lab environment setup must be completed before beginning Module 1 hands-on lab activities. Estimated setup time: 30-60 minutes. If you encounter issues, contact your course administrator before your first scheduled lab session.

## System Requirements

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| Component           | Minimum Requirement                      | Recommended                                |
|---------------------|------------------------------------------|--------------------------------------------|
| Operating System    | Windows 10 (22H2) or macOS 13            | Windows 11 (24H2) or macOS 15              |
| Browser             | Microsoft Edge (latest stable) or Chrome | Microsoft Edge — latest stable channel     |
| Microsoft 365 Apps  | M365 Apps for Business (current channel) | M365 Apps for Enterprise (current channel) |
| Internet Connection | 10 Mbps minimum                          | 25 Mbps or faster (for Teams meeting lab)  |
| Microphone          | Required for Teams labs                  | Headset with noise cancellation            |
| Screen Resolution   | 1280 × 768 minimum                       | 1920 × 1080 or higher                      |
| RAM                 | 8 GB                                     | 16 GB                                      |

### Option A: Microsoft 365 Developer Tenant (Recommended for Training)

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A Microsoft 365 Developer Tenant provides a free, full-featured M365 environment pre-configured for development and training. This is the recommended lab environment for all learners who do not have a Copilot-licensed production tenant.

193. Navigate to **developer.microsoft.com/microsoft-365/dev-program** and sign in with a Microsoft account (personal or work).
194. Select **Join Now** and complete the registration form. Choose "Personal Projects" as your primary use if prompted.
195. On the Dashboard, click **Set Up E5 Subscription**. This provisions a full Microsoft 365 E5 tenant with 25 user accounts — at no cost.
196. Note your admin credentials (admin@[yourdomain].onmicrosoft.com) — you will need these for Module 7 admin labs.

197. **Copilot License:** The Developer Tenant does not automatically include Copilot licenses. Request a Copilot trial via the Microsoft 365 Admin Center: Settings > Org Settings > Microsoft 365 Copilot > Start Trial.
198. Assign the Copilot license to at least 2 user accounts in the tenant (your admin account + one test user account).

## Option B: Organizational M365 Tenant with Copilot License

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If your organization has existing Microsoft 365 Copilot licenses, you may use your production tenant for most lab activities. Confirm the following with your IT administrator before proceeding:

- Your user account has a Microsoft 365 Copilot license assigned.
- Copilot features are enabled for your user account in the M365 Admin Center.
- You have access to at least one SharePoint document library for Modules 3 and 6 lab activities.
- You have permission to access the Microsoft 365 Admin Center for Module 7 admin labs (or a dedicated test admin account has been provisioned).
- You are permitted to access Copilot Studio for Module 6 agent-building labs.

### **Production Tenant Caution**

If using your organization's production tenant, do not use sensitive or confidential data in lab prompts or lab deliverables. Use only fictional or anonymized data for all lab submissions. Check with your IT and compliance teams before enabling Copilot Studio in a production tenant.

## Lab File Download Instructions

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199. Access the course learning platform (LMS) and navigate to the **Lab Resources** section.
200. Download the **CMC Lab Files 2026.zip** package. This contains all lab data files, templates, and reference documents for Modules 1–8.
201. Extract the ZIP to a folder named **CMC Labs** on your local drive or OneDrive.
202. For modules requiring SharePoint access (Modules 3, 6, and 7), upload the relevant lab files to a new SharePoint document library named **CMC Course Labs** in your training tenant.
203. Verify that the following key lab files are accessible and can be opened in their native M365 apps before your first lab session:

| File Name                     | Format                  | Used In        |
|-------------------------------|-------------------------|----------------|
| Lab_3_Project_Brief.docx      | Word                    | Module 3 Lab   |
| Lab_4_Sales_Dataset.xlsx      | Excel (Table format)    | Module 4 Lab   |
| Lab_5_Meeting_Recording.mp4   | Video (upload to Teams) | Module 5 Lab   |
| Lab_5_Meeting_Transcript.docx | Word                    | Module 5 Lab   |
| Lab_6_HR_Policy_Docs (folder) | SharePoint library      | Module 6 Lab B |
| Lab_7_Compliance_Scenario.pdf | PDF (reference)         | Module 7 Lab   |

## Troubleshooting Common Setup Issues

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| Issue                                        | Likely Cause                                       | Resolution                                                                     |
|----------------------------------------------|----------------------------------------------------|--------------------------------------------------------------------------------|
| Copilot icon not visible in Word/Excel/Teams | Copilot license not assigned or not yet propagated | Wait 24 hours after license assignment; verify assignment in M365 Admin Center |
| Copilot Chat shows Web mode only; Work mode  | Work mode requires M365 Copilot license (not free) | Confirm Copilot license is assigned and active in                              |

| Issue                                                      | Likely Cause                                                                 | Resolution                                                                            |
|------------------------------------------------------------|------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| unavailable                                                | tier)                                                                        | Admin Center                                                                          |
| Cannot access Copilot Studio                               | Copilot Studio not enabled for user or tenant                                | Admin must enable Copilot Studio in the Power Platform Admin Center                   |
| Agent Store not visible in Copilot Chat                    | Feature requires current channel M365 Apps or agent store not enabled        | Update M365 Apps to Current Channel; verify Agent Store is enabled by admin           |
| SharePoint files not appearing in Copilot Work mode search | Semantic Index not yet built for new files; indexing delay (up to 48 hrs)    | Wait 48 hours after uploading files to SharePoint before using as Copilot references  |
| Teams meeting Recap not generating                         | Meeting was not recorded or transcription was not enabled                    | Ensure both recording AND transcription are enabled before the meeting starts         |
| Python in Excel option not visible                         | Feature requires Excel for Windows with Python enabled; not available on Mac | Use Windows; verify Python in Excel is enabled via Insert > Formula > Python in Excel |

## Getting Help

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- **Course Support:** Contact your course administrator via the LMS helpdesk for lab file access issues, tenant provisioning problems, or license questions.
  - **Microsoft Support:** For tenant or license issues, access support at [admin.microsoft.com](https://admin.microsoft.com) > Support > New Service Request.
  - **Peer Community:** Post technical setup questions in the course discussion forum. Instructor-led cohorts should use the designated Teams channel for lab support.
  - **Microsoft Documentation:** [learn.microsoft.com/microsoft-365-copilot/setup-microsoft-365-copilot](https://learn.microsoft.com/microsoft-365-copilot/setup-microsoft-365-copilot) for official setup and configuration guidance.
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"The organizations that will lead in the AI era are not necessarily those with the most powerful models — they are those whose people know how to ask the right questions, evaluate the answers critically, and translate AI capability into human value."

— The Complete Copilot Master Certification Course, 2026 Edition

## **The Complete Copilot Master Certification Course**

2026 Edition | Document prepared: July 3, 2026

Prepared for: Rick | Exton, PA, United States

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