



COURSE 2

ADVANCED LEVEL

MICROSOFT 365 COPILOT

Copilot Advanced

Knowledge, agents and team adoption.

Move beyond prompting to build team knowledge systems, business use cases and organisational AI capability.

DURATION

1 Day · 6.5–7 hrs

GROUP SIZE

Up to 15 people

MODULES

10 units



COURSE OVERVIEW

From prompting to a workplace productivity platform

Microsoft 365 Copilot Advanced is an advanced one-day workshop focused on organisational knowledge, agents, notebooks, advanced prompting, business use cases and practical workplace applications.

Participants learn how to move beyond simple prompting and use Copilot as a workplace productivity platform across teams, information sources and business processes.

The course emphasises business outcomes, knowledge management, collaboration and scalable AI adoption.

DURATION

1 Day (6.5 – 7 hours)

WHO IS THIS COURSE FOR?

- Experienced Copilot users
- Project managers
- AI champions
- Organisations seeking broader adoption
- Team leaders and managers
- Business analysts
- Knowledge workers
- Teams scaling AI beyond pilots

What participants walk away with

LEARNING OUTCOMES

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

- 01 Apply advanced prompting techniques
- 02 Work effectively with organisational knowledge
- 03 Understand Microsoft Graph and grounding concepts
- 04 Use SharePoint and OneDrive as Copilot knowledge sources
- 05 Create and manage Notebooks
- 06 Build and use Copilot Agents
- 07 Understand Copilot Cowork
- 08 Design team use cases
- 09 Measure adoption and business value
- 10 Apply appropriate governance and human oversight

WHAT'S INCLUDED

Advanced prompt guide

Agent planning framework

Team use case workshop

Practical exercises

Adoption planning worksheet

COURSE MODULES

Knowledge, information and agents

01 Advanced Prompting and Reasoning

Learn prompt chaining, task decomposition, reusable templates and advanced prompting strategies for complex business tasks.

02 Working with Organisational Knowledge

Understand Microsoft Graph, grounding, permissions, organisational content and how Copilot discovers information across Microsoft 365.

03 SharePoint, OneDrive and Information Management

Explore how permissions, content structure and information quality influence Copilot's effectiveness and organisational knowledge discovery.

04 Pages, Libraries and Notebooks

Create focused AI workspaces, manage project knowledge and improve collaboration across teams.

05 Copilot Agents and Agent Builder

Learn when to use agents, how to create them, and how to design practical workplace assistants using organisational content.

COURSE MODULES

Business problems, adoption and capstone

06 Copilot Cowork

Understand multi-step task execution, approval workflows and cross-application productivity scenarios.

07 Solving Business Problems Across Microsoft 365

Apply Copilot across real-world scenarios:

Meeting preparation

Project reporting

Business proposals

Executive briefings

08 Team Use Case Design

Identify opportunities for AI adoption and determine when to use prompts, notebooks, agents, Cowork or automation.

09 Adoption, Governance and Human Oversight

Learn how to measure success, manage risk, and apply professional judgement when using AI in business environments.

10 Capstone Workplace Challenge

Apply learning through an end-to-end workplace scenario using multiple Microsoft 365 sources and Copilot capabilities.

PREREQUISITES

Completed Microsoft 365 Copilot Essentials, or practical Copilot experience

Access to Microsoft 365 Copilot

A laptop for workshop activities



OPTIMISE AI

PLAN. BUILD. ADOPT. GOVERN. AI

Build organisational AI capability

Optimise AI is an Australian AI consulting firm helping organisations plan, build, adopt and govern AI with confidence. We deliver onsite or online training for groups of up to 15 participants, with smaller executive and leadership groups also available.

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