



COPILOT Level 2 Workflows & Custom Agents

Turn AI into real business impact

Duration : 1 day

Course Overview

Copilot Cowork and Copilot Studio are Microsoft's low-code platforms for creating workflows and agents that can answer questions, automate tasks, and support employees or customers. Workflows automate repetitive tasks and ensure consistent execution across systems and integrations, while agents provide flexible solutions that can interpret unstructured input and apply decision-making and judgement. Used together, workflows and agents unlock powerful, end-to-end automation across an organisation.

Prerequisites

Basic understanding of Microsoft Copilot (Copilot Level 1 or equivalent hands-on experience).

Format

Instructor-led, with live demonstrations and hands-on exercises in Copilot Cowork and Copilot Studio.

Audience:

Business users, power users, and citizen developers who want to move beyond everyday Copilot Chat use into building repeatable workflows and custom agents.

What Participants Will Need (Bring-Your-Own-Device)

This course is hands-on. Participants joining on their own laptop should arrive with the following software installed and licences/access confirmed in advance, ideally checked with their IT administrator a few days before the course.

Software to have installed

- A modern web browser — Microsoft Edge (recommended) or Google Chrome, kept up to date, for Copilot Chat, Cowork, Copilot Studio, and Power Platform Admin Center
- Microsoft 365 apps (desktop or web) — Outlook, Word, Excel, PowerPoint, Teams, and SharePoint/OneDrive, since exercises pull real context from these apps
- The Microsoft 365 Copilot app (desktop or browser-based), which is where Cowork is launched from
- Stable internet access sufficient for cloud app use and video throughout the day

Not required, but useful: the Teams mobile app for testing published agents on a second device.



Licensing terms for Copilot and Copilot Studio have changed several times recently as Microsoft moves to usage-based billing — confirm current requirements with your Microsoft account team or admin centre before the course.

Suggested Agenda

Time	Session
9:30 – 10:00	Welcome, Copilot recap, and course objectives
10:00 – 11:00	Module 1: Foundations — Workflows, Agents & Agentic AI
11:00 – 11:15	Break
11:15 – 12:45	Module 2: Getting Started with Copilot Copilot
12:45 – 13:30	Lunch
13:30 – 14:00	Module 3: Copilot in Practice — requests, use cases, governance
14:00 – 15:00	Module 4: Building Agents with Copilot Studio
15:00 – 15:15	Break
15:15 – 16:15	Module 4 (cont.) Building Agents with Copilot Studio
16:15 – 16:30	Wrap-up, Q&A, and next steps

Course Content

Module 1 — Foundations: Workflows, Agents & Agentic AI

This module sets the conceptual groundwork for the rest of the day, establishing shared vocabulary before participants start building.

Basic workflows and agents in Microsoft 365

An overview of where workflows and agents already show up across Microsoft 365 today — from Power Automate flows to built-in Copilot agents in apps like Outlook, Teams, and SharePoint. Participants see concrete, familiar examples before the terminology gets more advanced.

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

- Distinguish a workflow from an agent in plain business terms
- Identify existing workflow and agent touchpoints across Microsoft 365



Introduction to Agentic AI

A plain-language explanation of what makes an AI system “agentic” — the ability to reason over a goal, choose actions, use tools, and adapt when the situation changes, rather than simply responding to a single prompt. Includes a short discussion of where agentic AI adds value versus where a simple workflow is more appropriate.

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

- Explain the core characteristics of agentic AI (reasoning, planning, tool use, autonomy)
- Recognise when a task calls for agentic behaviour rather than a fixed, linear workflow

Copilot Chat vs Cowork vs Agents

A side-by-side comparison of the three main ways people interact with Copilot: single-turn conversational Copilot Chat, the multi-step task delegation of Cowork, and purpose-built custom agents created in Copilot Studio. Participants leave with a simple decision framework for choosing the right tool for a given task.

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

- Compare the capabilities and best-fit use cases of Copilot Chat, Cowork, and custom agents
- Apply a decision framework to pick the right Copilot surface for a given scenario

Understanding Work IQ

An introduction to Work IQ, the layer that lets Copilot understand organisational context — relationships between people, files, meetings, and projects — so that responses and automations are grounded in real, relevant business data rather than generic answers.

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

- Describe what Work IQ is and the type of organisational context it draws on
- Explain how grounded context improves the relevance and accuracy of Copilot's output

How Cowork uses Microsoft Graph

A look under the hood at how Cowork uses Microsoft Graph to securely access emails, files, calendars, chats, and other Microsoft 365 data on the user's behalf — always within existing permissions — to complete multi-step tasks.

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

- Explain the role Microsoft Graph plays in powering Cowork's task automation
- Understand how existing permissions and access controls govern what Cowork can see and do

Module 2 — Getting Started with Copilot Cowork

A hands-on introduction to Cowork, covering setup, licensing, and how to write requests that reliably produce the outcome you want.



Getting Started with Cowork

A guided walkthrough of the Cowork interface: starting a new task, monitoring progress, reviewing intermediate steps, and receiving the final output. Participants complete their first simple Cowork task during this session.

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

- Navigate the Cowork interface confidently
- Launch, monitor, and review a Cowork task end to end

Access and licensing

An overview of the licensing requirements for Cowork, how access is provisioned by IT administrators, and what to check if a feature appears unavailable.

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

- Identify the licensing prerequisites needed to use Cowork
- Know who to contact internally to request or troubleshoot access

Writing Effective Cowork Requests

Practical techniques for writing requests that give Cowork enough context and structure to succeed on the first attempt — covering scope, source data, format expectations, and how to iterate when the first result isn't quite right.

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

- Write clear, well-scoped requests that reduce back-and-forth
- Iterate on a request based on Cowork's intermediate output

Outcomes vs prompts

A key mindset shift for working with Cowork: describing the outcome you want (e.g. “prepare my board pack from this month's project updates”) rather than scripting the exact steps, and letting Cowork plan and execute the task.

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

- Reframe a task as a desired outcome rather than a rigid, step-by-step prompt
- Recognise when more explicit instruction is still needed for consistency or compliance reasons

Context and approvals

How Cowork gathers context from relevant files, emails, and conversations, and where human approval checkpoints sit in the process — particularly before any action that sends, shares, or modifies data on the user's behalf.

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

- Explain how Cowork sources context for a task
- Identify where approval checkpoints protect against unintended actions



Module 3 — Cowork in Practice

Moving from mechanics to application: realistic use cases, recurring automation, reusable building blocks, and the governance guardrails that keep Cowork safe to use at scale.

Practical Use Cases

A set of realistic, role-based examples — such as summarising a week's meetings, drafting a status report from multiple sources, or preparing onboarding materials — that participants can adapt to their own work. Time is set aside for participants to try a use case relevant to their own role.

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

- Map Cowork's capabilities to real tasks in participants' own roles
- Complete a self-selected practice task using Cowork

Scheduled tasks

How to configure Cowork tasks to run automatically on a recurring schedule (daily, weekly, or at a set trigger point), turning a one-off request into a standing automation.

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

- Configure a recurring scheduled task in Cowork
- Identify good candidates for scheduling versus one-off requests

Reusable skills

An introduction to packaging a well-tested request as a reusable “skill” that can be triggered again with new inputs, reducing the need to redraft the same instructions from scratch each time.

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

- Save and reuse a Cowork request as a repeatable skill
- Explain the benefit of reusable skills for team-wide consistency

Governance & Security

An overview of the guardrails around Cowork: data boundaries, permission inheritance, audit visibility, and administrator controls — plus practical guidance on what sensitive data should and shouldn't be routed through automated tasks.

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

- Describe how Cowork respects existing data permissions and boundaries
- Apply good judgement about what data is appropriate to include in an automated task

Module 4 — Building Agents with Copilot Studio

The second half of the day shifts from using Microsoft-built automation (Cowork) to designing custom agents purpose-built for a specific process, department, or audience.



Introduction to Copilot Studio

An overview of Copilot Studio as a low-code platform for designing, testing, and publishing custom agents, and how it complements Cowork and out-of-the-box Copilot experiences.

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

- Explain what Copilot Studio is used for and where it fits alongside Cowork
- Identify the core building blocks of a Copilot Studio agent

Creating a new agent in Copilot Studio

A guided, hands-on walkthrough of creating a new agent from scratch: naming and describing the agent, setting its instructions and tone, and configuring its initial knowledge sources.

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

- Create a new agent in Copilot Studio
- Configure an agent's core instructions and knowledge sources

Working with environments

How environments are used to separate development, testing, and production agents, and why this separation matters for safe iteration and change management.

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

- Explain the purpose of environments in Copilot Studio
- Move an agent between environments as part of a safe release process

Adding topics

How to define topics — specific conversation scenarios with trigger phrases and conversational flows — so the agent responds appropriately to common questions and requests.

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

- Create a topic with trigger phrases and a conversation flow
- Structure topics so an agent handles a range of related questions consistently

Taking action with tools

How to connect an agent to tools and connectors so it can do more than converse — retrieving live data, updating records, or calling external systems and APIs as part of a conversation.

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

- Add a tool or connector to extend an agent's capabilities
- Design a topic that uses a tool to complete an action, not just answer a question



Automation with triggers

How agents can be started automatically by an event — such as a new item in a list, an incoming email, or a scheduled time — rather than waiting for a user to start a conversation.

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

- Configure a trigger to start an agent automatically
- Identify appropriate business scenarios for trigger-based automation

Agents as assistants

A look at how agents can be embedded as ongoing assistants within Microsoft 365 apps and channels (Teams, Microsoft 365 Copilot, websites), supporting employees or customers directly where they already work.

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

- Identify channels where an agent can be deployed as an assistant
- Evaluate the fit of an assistant-style agent for a given audience

Testing your agents

How to use Copilot Studio's built-in test pane to validate topics, trigger phrases, and tool calls before publishing — and how to iterate based on test conversations.

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

- Use the test pane to validate an agent's behaviour before release
- Identify and resolve common issues found during testing

Publishing agents and analysing performance

The final step of the agent lifecycle: publishing an agent to its intended channel(s) and using built-in analytics to monitor usage, resolution rates, and areas for improvement over time.

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

- Publish an agent to a target channel
- Interpret core analytics to identify opportunities to improve an agent

Course Wrap-Up

The day closes with a short recap of when to reach for a workflow, when to reach for Copilot, and when a custom Copilot Studio agent is the right tool — along with a discussion of next steps for applying these skills back in participants' own roles.