Faysal Aziz

AI Citizen Developer: Building Agents & Low-Code Workflows

From Personal Productivity to Enterprise Solutions with Copilot Studio and Power Platform - 2 days

FA-0056 · 2 days

Agentic & Generative AI · Data & Analytics · Automation, RPA & Power Platform

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Introduction

Moving beyond individual AI usage requires a transition from completing tasks faster to building scalable solutions for entire teams. This two-day course empowers non-traditional developers to become Citizen Developers who can identify operational bottlenecks, design structured data foundations, and deploy low-code AI agents. Grounded directly in survey insights from Steelcase staff, emphasizing high-demand areas like automated reporting, custom agent creation, and process improvement, this training bridges business problem-solving with technical implementation.

The course is delivered by an instructor with over 30 years of industry experience and prioritizes hands-on, business-impactful solution architecture over theoretical concepts. Participants will use Microsoft Copilot Studio, Microsoft Dataverse, and low-code automation concepts to design, build, test, and deploy functional AI agents and automated workflows.

Learning outcomes

- Transition from an individual AI user to a team-focused Citizen Developer
- Analyze operational processes to identify high-impact AI and automation opportunities
- Quantify business value, calculate prospective ROI, and draft business cases for AI initiatives
- Design data models, custom tables, and business rules within Microsoft Dataverse
- Build and configure custom AI agents using Microsoft Copilot Studio

- Implement generative answers, topics, trigger phrases, and autonomous capabilities
- Connect low-code automation flows with AI agents to process multi-step workflows
- Apply agent design principles, testing methodologies, and deployment practices
- Prepare functional prototypes for internal business innovation challenges

Prerequisites

- Working experience with Microsoft Copilot Chat or similar AI assistant tools
- Basic understanding of spreadsheets, data tables, and structured business logic
- Familiarity with common business software and organizational process steps
- Access to a Microsoft 365 environment with Power Apps / Dataverse and Microsoft Copilot Studio access

Target Audience

- Business users, analysts, and domain specialists seeking to build solutions for their teams
- Citizen developers looking to leverage Microsoft low-code and agentic AI platforms
- Process owners and operation leads aiming to automate repetitive operational bottlenecks
- Participants preparing prototypes for enterprise AI innovation challenges

Training outline

1. Citizen Developer Mindset and Opportunity Identification

The AI solution builder paradigm

1. Evolving from task execution to workflow builder
2. Definition and role of the Citizen Developer in modern enterprises
3. Identifying AI and automation potential in departmental operations
4. Balancing build, buy, and extend strategies

Business process analysis and ROI estimation

1. Mapping end-to-end operational workflows
2. Pinpointing bottlenecks in data handling, reporting, and approvals
3. Quantifying time savings, cost reductions, and efficiency gains

4. Building a lightweight business case for team AI initiatives

2. Data Modeling and Foundations with Microsoft Dataverse

Enterprise data modeling basics

1. Dataverse architecture: tables, columns, and relationships
2. Designing relational schema for business application data
3. Creating custom tables and configuring column data types

Data integrity and security rules

1. Defining business rules to enforce logic without writing code
2. Setting up security roles and permission boundaries
3. Ensuring clean data structures for agent consumption

3. Agent Architecture and Design Principles

Agentic concepts and enterprise positioning

1. Transition from simple prompts to step-based agentic behavior
2. Understanding triggers, actions, memory, and state management
3. Scoping agent capabilities to defined operational guardrails

Agent design fundamentals

1. Defining clear use cases and target persona requirements
2. Topic planning, trigger phrase design, and conversation paths
3. Human-in-the-loop oversight, approval gates, and error handling

4. Building Custom Agents in Microsoft Copilot Studio

Environment setup and initial agent creation

1. Copilot Studio workspace orientation and tool overview
2. Generating agents using natural language capability
3. Configuring system instructions and core persona behavior

Topic management and generative capabilities

1. Creating and configuring user topics and conversational nodes
2. Configuring Generative Answers grounded in internal documents and knowledge sources
3. Managing fallback topics and unhandled user inputs

Building autonomous agents

1. Fundamental concepts of autonomous, event-triggered capabilities
2. Mapping multi-step workflows into autonomous agent actions
3. Managing agent memory, context retention, and step execution

5. Low-Code Automation Integration and Workflow Orchestration

Trigger-action logic for low-code solutions

1. Automation execution concepts: triggers, conditions, and actions
2. Combining Copilot Studio with automated flow logic
3. Processing structured form data, incoming communications, and approvals

Practical automation patterns

1. Knowledge extraction and automated summary distribution
2. Multi-step draft and human review orchestration loops
3. Automated notification, email generation, and logging systems

6. Agent Testing, Deployment, and Governance

Validation and iterative testing

1. Testing agent responses using native execution panels
2. Identifying edge cases, topic collisions, and incorrect routes
3. Troubleshooting agent logic, actions, and output accuracy

Deployment and life-cycle management

1. Publishing agents to target Microsoft enterprise channels

2. Monitoring usage metrics, user feedback, and agent performance
3. Maintaining and updating topics and data foundations over time

Innovation readiness and scaling

1. Structuring prototypes for corporate innovation challenges
2. Scaling low-code workflows from local teams to wider organizational adoption
3. Applying security, compliance, and governance controls to citizen solutions

Disclaimer

This course outline is provided as a general training framework and proposed scope of coverage only. It does not constitute a fixed agenda, binding commitment, official certification pathway, partnership representation, or guaranteed delivery sequence. The trainer reserves the right, at his professional discretion, to amend, expand, condense, reorder, replace, or otherwise modify any portion of the content, emphasis, structure, tools, demonstrations, or delivery approach without prior notice, based on participant background, organizational requirements, technology changes, platform availability, security considerations, and instructional judgment.

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