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AI-Powered Business Analytics & Decision Intelligence with Microsoft Copilot

Turning business data, research and operational information into clearer analysis, stronger reporting and better-informed management decisions.

FA-0088

Agentic & Generative AI · AI for Leaders & Business · Data & Analytics

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Introduction

Duration: One Day / Two Days
(Depending on required depth, participant numbers and available Microsoft Copilot capabilities)

Managers rarely suffer from a shortage of information. The greater problem is turning the information already available across spreadsheets, reports, presentations, supplier records, operational systems, market research and management documents into something that supports a timely and defensible decision.

Microsoft Copilot is increasingly becoming part of that analytical workflow. Its value extends beyond drafting emails or generating text. Used effectively, Copilot can help managers interrogate business information, examine data from different perspectives, identify trends and exceptions, research external developments, consolidate findings and transform analytical results into reports and presentations suitable for decision makers.

This programme focuses on those practical capabilities. Participants learn how to work with Microsoft Copilot across Excel, Word, PowerPoint and the broader Microsoft 365 environment to move from raw information toward structured analysis and management communication. Analyst and Researcher extend

that capability by supporting deeper data interrogation and information research, while Power BI Copilot provides another route for exploring and communicating structured business data.

Particular attention is given to prompt engineering and context engineering because useful analysis depends heavily on the quality of the instructions, business definitions, source material and decision criteria supplied to AI. Participants will learn how to frame analytical questions properly, provide meaningful context, constrain assumptions and verify AI-generated conclusions before those conclusions influence management decisions.

The programme also introduces the progression from individual Copilot usage toward AI-assisted workflows and agents. Where organizational access permits, participants can explore capabilities associated with Copilot Studio, Power Automate and connected business data. Where these platforms are not available within the customer environment, the relevant material can be presented through instructor-led demonstrations, architectural walkthroughs and capability discussions without affecting completion of the core analytical programme.

Hands-on activities are integrated throughout the applicable parts of the course. Participants will work directly with available Microsoft Copilot capabilities to analyse information, refine prompts, investigate findings and convert results into practical management outputs. The exact level of hands-on activity will naturally depend on the licenses, applications, datasets and organizational permissions available during training.

The instructor brings over **30 years of industry experience** to the programme. The training therefore concentrates on real industry-demanded capabilities, practical management outputs and realistic organisational constraints rather than treating artificial intelligence as a purely academic subject.

Learning outcomes

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

- Identify appropriate uses of AI for business analysis and management decision support.
- Select suitable Microsoft Copilot capabilities for analysis, research, reporting and presentation tasks.
- Prepare and structure business information for more effective AI-assisted analysis.
- Use Copilot in Excel to interrogate and interpret structured business data.
- Use Analyst to investigate datasets and generate decision-relevant observations.
- Use Researcher to perform structured internal and external information research.
- Apply Copilot in Word to develop analytical reports, summaries and management documents.
- Apply Copilot in PowerPoint to convert findings into structured management presentations.
- Identify trends, exceptions, anomalies, variances and relationships in operational information.
- Consolidate findings from multiple files and information sources.
- Apply prompt engineering techniques to analytical and reporting tasks.
- Apply context engineering to improve relevance, consistency and accuracy.
- Convert analytical findings into decision-oriented management information.

- Critically evaluate and validate AI-generated analysis before business use.
- Understand the role of Power BI Copilot in AI-assisted business intelligence.
- Understand how Copilot Studio, agents and automation can extend recurring analytical workflows.
- Recognize licensing, access, governance and data-security considerations affecting enterprise AI use.

Prerequisites

- Working knowledge of Microsoft 365 applications.
- Familiarity with Excel and common business datasets.
- Basic understanding of management reporting and data-driven decision making.
- General familiarity with commercial, procurement, supply-chain, project or operational information.
- Access to the organisation's Microsoft 365 environment is recommended.
- Access to relevant Microsoft Copilot capabilities is recommended for participant hands-on activities.
- Availability of Microsoft 365 Copilot, Analyst, Researcher, Power BI Copilot and other capabilities depends on organisational licensing and administrator configuration.
- Copilot Studio, Power Automate and Dataverse access is not mandatory for completion of the core programme.
- Where access-controlled platforms are unavailable, applicable topics may be delivered through instructor demonstration and guided walkthrough.
- No programming or AI development experience is required for the core course.

Training outline

1. AI for Business Analytics and Decision Support

1. AI-assisted analysis versus content generation
2. Operational data as analytical context
3. Structured and unstructured business information
4. Analytical versus transactional questions
5. AI-supported management decisions
6. Human judgement and accountability
7. Accuracy, verification and responsible use

2. Microsoft Copilot and Analytics Toolchain

1. Microsoft 365 Copilot

2. Copilot Chat
3. Copilot in Excel
4. Copilot in Word
5. Copilot in PowerPoint
6. Analyst
7. Researcher
8. Copilot in Power BI
9. Copilot Studio
10. Power Automate integration
11. Selecting the appropriate Copilot capability

3. Preparing Business Data for AI Analysis

1. Data structure and consistency
2. Excel tables, CSV files and workbook preparation
3. Multiple-file analysis
4. Data quality and missing information
5. Categories, dimensions and measures
6. Dates, currencies and units
7. Data normalization considerations
8. Sensitive and restricted information

4. Prompt Engineering for Analytical Work

1. Defining the analytical objective
2. Establishing business perspective
3. Specifying data scope
4. Defining metrics and comparison dimensions
5. Requesting trends, exceptions and anomalies
6. Controlling assumptions
7. Defining output requirements
8. Iterative analytical prompting
9. Prompt refinement and validation

5. Context Engineering for Business Analysis

1. Prompt context and organisational context

2. Supplying relevant files and datasets
3. Establishing business definitions
4. Providing decision criteria
5. Grounding analysis in authoritative information
6. Controlling information scope
7. Maintaining analytical context
8. Reusable analytical instructions

6. AI-Assisted Data Analysis

1. Copilot in Excel for structured data
2. Analyst for data interrogation
3. Multi-file analysis
4. Data summarization
5. Comparative analysis
6. Trend identification
7. Variance analysis
8. Exception and anomaly identification
9. Performance segmentation
10. Relationship and driver analysis
11. Follow-up interrogation of findings

7. Research and External Intelligence

1. Researcher for structured information gathering
2. Internal and external information sources
3. Vendor and market intelligence
4. Supplier landscape research
5. Capability and market comparison
6. External risk information
7. Supply-market developments
8. Source citations and traceability
9. Research validation

8. From Analysis to Management Communication

1. Converting findings into management information

2. Executive summaries
3. Decision-focused reports
4. KPI and variance narratives
5. Exception reporting
6. Risk and opportunity summaries
7. Management briefing documents
8. Copilot in Word for report development
9. Audience-specific communication
10. Evidence and source references
11. Copilot in PowerPoint for management presentations
12. Converting analytical findings into presentation structures
13. Presentation summarization and refinement

9. AI-Assisted Reporting with Power BI

1. Power BI semantic models and AI readiness
2. Copilot-assisted data exploration
3. Natural-language interaction with business data
4. Report creation and refinement
5. Visual selection
6. Narrative summaries
7. Management-level report summaries
8. Interrogating existing reports with Copilot
9. Validating AI-generated interpretations

10. Applying AI to Commercial, Operational and Project Data

1. Spend and category information
2. Supplier performance information
3. Pricing and cost data
4. Demand and consumption data
5. Cost optimization
6. Project and initiative timeline analysis
7. Market and supplier intelligence
8. Risk and exception information

9. Cross-dataset management analysis

11. Technical Extension: Agents and AI-Assisted Workflows

1. Copilot Studio fundamentals
2. Agent instructions and context
3. Knowledge sources
4. SharePoint and organisational information
5. Structured data connections
6. Dataverse considerations
7. Tools and actions
8. Generative orchestration
9. Power Automate integration
10. Permissions and access boundaries
11. Testing and validation

    Analytical Agent Applications

    1. Multi-file analysis
    2. Data consolidation and classification
    3. Exception and anomaly identification
    4. Supplier and market intelligence
    5. Recurring management reporting
    6. KPI and variance summarization
    7. Data-to-report workflows
    8. Management information retrieval

    Operational and Governance Considerations

    1. Grounding and source control
    2. Data permissions
    3. Output validation
    4. Human approval points
    5. Monitoring
    6. Governance and controlled deployment

Practical Training Approach

Hands-on exercises and guided practical activities are incorporated throughout the applicable course topics rather than being isolated into a separate exercise module. Practical work will concentrate on the Microsoft Copilot capabilities available within the customer environment and may include data

interrogation, research, prompt refinement, analytical validation, management reporting and presentation development.

Access to Copilot Studio, Copilot capabilities associated with Power Automate, Dataverse or other licensed Microsoft services is not required for the core programme. Where participant access is unavailable, these areas may be covered through instructor-led demonstrations, guided walkthroughs and discussion of architecture, capabilities and business applications. Additional practical time may instead be allocated to the Microsoft 365 Copilot capabilities available to participants.

The depth and number of practical activities will be adjusted to the selected one-day or two-day delivery format so that adequate time remains for participants to perform the work rather than simply being exposed to an excessive number of features.

Disclaimer

This training outline is provided as a structured guideline representing the anticipated scope and sequence of the programme. The trainer reserves the right, in the exercise of professional judgement, to amend, reorder, consolidate, expand, reduce or substitute individual topics, demonstrations and practical activities where reasonably necessary to accommodate participant requirements, available technology, licensing or access restrictions, organisational circumstances, changes to Microsoft products and services, or the practical progress and pacing of the course. Such adjustments may be made without prior notice where considered appropriate to preserve the relevance, effectiveness and overall learning objectives of the programme.

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