Faysal Aziz

Lead with Copilot

Turn AI into leadership leverage - 1 day

FA-0286 · 1 day

Agentic & Generative AI · AI for Leaders & Business

Introduction

Microsoft Copilot is rapidly moving beyond individual productivity assistance. Leaders can now use AI not only to draft content and summarise information, but also to retrieve organisational knowledge, prepare meetings, analyse information, coordinate follow-up work and delegate increasingly complex activities across Microsoft 365. Microsoft's current capabilities span Word, Excel, PowerPoint, Outlook and Teams, while newer experiences such as Copilot Cowork extend this toward carrying out work across Microsoft 365 on a user's behalf.

At the same time, **Agentic AI** is changing the leadership conversation from "What can AI help me write?" to "What work can AI help my organisation perform?" Microsoft Copilot Studio now supports agents and workflows capable of handling multi-step business processes, while autonomous agents can respond to events, make bounded decisions and execute tasks using defined instructions, permissions and guardrails. Recent 2026 developments have further strengthened Copilot Studio's support for more complex agentic processes and production use.

For leaders, however, technology capability is only part of the challenge. Business value depends on selecting the right problems, redesigning work, creating appropriate controls, encouraging adoption and measuring whether AI is actually improving performance. Microsoft's current adoption guidance similarly emphasises executive sponsorship, prioritisation, success measures, organisational readiness and ongoing measurement rather than technology deployment alone.

This intensive one-day course therefore concentrates on **leadership application rather than technical depth**. Participants will examine where Microsoft Copilot can remove administrative friction from their own work, how AI can strengthen information synthesis and decision support, how Agentic AI can automate or coordinate suitable business processes, and how leaders can identify and prioritise opportunities within their functions.

A central objective is to move from discussion to action. Participants will develop at least one practical AI asset that can be taken back to the workplace, such as a reusable leadership prompt, AI assistant, agent concept, workflow or working Copilot-based solution. Because this is a one-day programme, the emphasis

is deliberately placed on a manageable set of high-value capabilities rather than attempting to cover the entire Microsoft Copilot and Copilot Studio ecosystem.

The instructor brings **over 30 years of industry experience** and will deliver the programme using practical, industry-demanded approaches focused on real organisational requirements, leadership challenges and business outcomes rather than presenting the subject as a primarily academic discipline.

Learning outcomes

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

- Improve personal leadership productivity using Microsoft Copilot across meetings, communications, reporting, presentations and follow-up activities.
- Use AI to locate, consolidate and summarise information for faster management decision-making.
- Apply AI to identify insights, risks, issues, dependencies and areas requiring leadership attention.
- Distinguish between AI assistants, workflows, agents and autonomous agentic processes.
- Identify high-value AI opportunities within their own functions and teams.
- Evaluate AI opportunities according to business value, productivity improvement, efficiency, risk reduction and implementation feasibility.
- Recognise where human judgement, oversight and approval should remain part of an AI-enabled process.
- Develop reusable prompting approaches for leadership and management activities.
- Understand the leadership responsibilities involved in driving AI adoption across teams.
- Identify appropriate measures for AI adoption and business impact.
- Build or design at least one practical AI solution, assistant, agent, workflow or reusable prompt for immediate workplace application.
- Define practical next actions for introducing or expanding AI within their area of responsibility.

Prerequisites

- Basic familiarity with Microsoft 365 applications.
- General understanding of the participant's own business function and operational processes.
- No programming or AI development experience required.
- Access to Microsoft 365 Copilot is strongly recommended for hands-on participation.
- Access to Microsoft Copilot Studio is recommended where agent-building capabilities are to be used.
- Participants should identify one recurring leadership, management or operational activity that could potentially benefit from AI.

Training outline

1. AI, Copilot and the Changing Role of Leadership

1. Microsoft Copilot in the modern workplace
2. Generative AI versus Agentic AI
3. Assistants, agents, workflows and autonomous agents
4. Human-AI collaboration
5. Leadership opportunities and responsibilities
6. Business outcomes versus technology adoption

2. Microsoft Copilot for Leadership Productivity

1. Microsoft 365 Copilot capabilities
2. Copilot Chat and organisational information
3. Meeting preparation and meeting intelligence
4. Meeting summaries and action items
5. Email and communication management
6. Management reporting
7. Presentation development
8. Document summarisation
9. Leadership briefings
10. Follow-up and task coordination

3. Prompting for Leaders

1. Leadership prompt structure
2. Context and objective definition
3. Role and audience specification
4. Information and source grounding
5. Output requirements
6. Iterative prompting
7. Reusable prompt development
8. Prompt libraries for teams

4. AI-Supported Decision-Making

1. Information discovery
2. Executive summarisation
3. Data and document synthesis
4. Insight identification
5. Risk and issue identification
6. Assumption identification
7. Alternative perspectives
8. Decision preparation
9. Human judgement and validation

5. Identifying High-Value AI Opportunities

1. Leadership productivity opportunities
2. Team productivity opportunities
3. Repetitive knowledge work
4. Information-intensive processes
5. Coordination and follow-up activities
6. Decision-support activities
7. Process bottlenecks
8. AI suitability assessment

6. Prioritising AI Opportunities

1. Business value
2. Productivity improvement
3. Efficiency improvement
4. Risk reduction
5. Frequency and scale
6. Implementation complexity
7. Data availability
8. Human oversight requirements
9. Value-versus-effort prioritisation

7. Agentic AI for Business Leaders

1. Agentic AI fundamentals
2. Microsoft Copilot Studio
3. Agent instructions
4. Knowledge and organisational data
5. Actions and tools
6. Triggers and workflows
7. Multi-step processes
8. Autonomous execution
9. Human approval points
10. Permissions and guardrails
11. Agent monitoring and governance

8. From Copilot User to AI-Enabled Leader

1. Executive sponsorship
2. Leadership role modelling
3. AI adoption barriers
4. Team experimentation
5. AI champions
6. Responsible adoption
7. Workflow redesign
8. Adoption measurement
9. Productivity and value measurement
10. Scaling successful AI practices

9. Practical AI Solution Development

1. Business problem selection
2. Desired business outcome
3. Current workflow identification
4. AI intervention point

   Solution type selection

   1. Reusable prompt
   2. Copilot assistant
   3. AI workflow

    4. Copilot Studio agent
6. Knowledge and information requirements
7. Instructions and actions
8. Human oversight
9. Validation criteria
10. Immediate deployment readiness

10. Leadership AI Action Plan

1. Priority AI opportunity
2. Immediate individual productivity action
3. Immediate team productivity action
4. Adoption action
5. Business-value measure
6. Governance consideration
7. Next-step ownership

Disclaimer

This training outline is intended to serve as a structured guideline for the programme and reflects the anticipated scope and learning priorities at the time of preparation. The trainer reserves the discretion to amend, reorder, expand, reduce or substitute topics where reasonably necessary to accommodate participant requirements, available technology, organisational circumstances, product changes, time constraints or emerging industry practices. Such adjustments may be made without prior notice where they are considered beneficial to the overall learning objectives and effectiveness of the programme.

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