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The AI-Enabled Leader: Microsoft 365 Copilot for Leaders

Connect leadership tasks, better-informed decisions and practical AI adoption.

FA-0837 · 1 day

AI for Leaders & Business · Agentic & Generative AI

Apply Microsoft 365 Copilot to leadership tasks, prioritise AI opportunities and build a knowledge-grounded assistant with reusable prompts.

Introduction

Most leaders do not lack ideas. They lack hours. The week disappears into meetings that need writing up, updates that need turning into slides, trackers that need reading closely enough to spot the one number that matters, and emails that need the right tone for the right stakeholder. None of it is unimportant, but much of it is repetitive, and it crowds out the work only a leader can do: setting direction, making judgement calls and developing people.

Microsoft 365 Copilot assists work across Teams, Outlook, Word, Excel, PowerPoint and OneNote. Participants connect a meeting action list with a management update, slides and stakeholder communication, reviewing each output. Agent Builder supports knowledge-grounded assistants; Copilot Studio extends agents with tools and actions, subject to the available permissions and licences.

The real value, however, does not come from knowing which button to press. It comes from knowing where AI earns its place in a leader's own function, how to ask it for exactly what is needed, how to check what it returns, and how to bring a team along so that adoption becomes a habit rather than a pilot that fades. AI output can be confident and still be wrong, especially with numbers, and it is only as safe as the data people choose to give it. Leaders set that standard for everyone else.

Participants use a recurring leadership task throughout the day: reviewing where time goes, practising an end-to-end Copilot workflow, preparing a prompt pack, prioritising AI opportunities and building a bounded knowledge-grounded agent. The workshop connects individual practice with responsible team adoption.

Learning outcomes

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

- Use Microsoft 365 Copilot to improve personal productivity and management effectiveness in day-to-day leadership work.
- Run end-to-end Microsoft 365 Copilot workflows across Teams, Outlook, Word, Excel, PowerPoint and OneNote.
- Apply a simple prompting framework to real leadership tasks such as executive summaries, business cases, risk analysis and performance reporting.
- Identify and prioritise AI opportunities within their own function using a value-versus-effort approach.
- Build a usable agent with Agent Builder and understand how Copilot Studio extends agents into action.
- Develop a bounded AI assistant and a reusable personal prompt pack through guided exercises.
- Lead AI adoption in their teams, including responsible use and data protection.

Prerequisites

- Identify one real recurring task that takes up significant time each week or month.
- Bring a non-confidential sample document related to that task.
- A laptop with a current web browser.
- A Microsoft 365 work account with a Microsoft 365 Copilot licence, Agent Builder access and approved sample content. Copilot Studio demonstrations require the relevant environment access and capacity.

Training outline

1. The AI-Enabled Leader

1. How leadership work changes with AI
2. Where does my week go: a personal time audit
3. A first quick win with Microsoft 365 Copilot
4. Responsible use and data protection essentials

2. Executive Productivity with Microsoft 365 Copilot

From meeting to action: an end-to-end workflow

1. Meeting transcript to action list
2. Steering committee update in Word

    3. Executive slides in PowerPoint
    4. Stakeholder email in Outlook
    5. Capturing decisions in OneNote
2. Spotting risks and trends in KPI and project trackers with Excel
3. Checking and verifying AI output

3. Practical Prompting for Leaders

1. The Goal, Context, Source and Expectations framework

   Prompting for leadership tasks
    1. Executive summaries
    2. Business cases
    3. Risk analysis
    4. Vendor management
    5. Performance reporting
    6. Team communications
3. Weighing options with pros, cons and a recommendation
4. Building a personal prompt pack

4. AI Opportunity Discovery Workshop

1. Mapping repetitive and information-heavy work
2. Scoring opportunities by value and effort
3. Prioritising the opportunity list
4. Turning the top opportunity into an agent specification

5. Agent Creation Workshop

1. Agent Builder and Copilot Studio: choosing the right tool

   Building an agent with Agent Builder
    1. Purpose and instructions
    2. Knowledge from SharePoint and uploaded files
    3. Testing, refining and sharing

   Stepping up to Copilot Studio
    1. From answering to acting
    2. Taking action through Outlook and Teams
4. Agent showcase

5. Leading adoption: from personal use to team practice

Disclaimer

This outline is a guideline only. The trainer reserves the right to amend, reorder or replace any part of the content as he sees fit, without prior notice, to suit participant needs, platform availability or changes in product functionality.

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