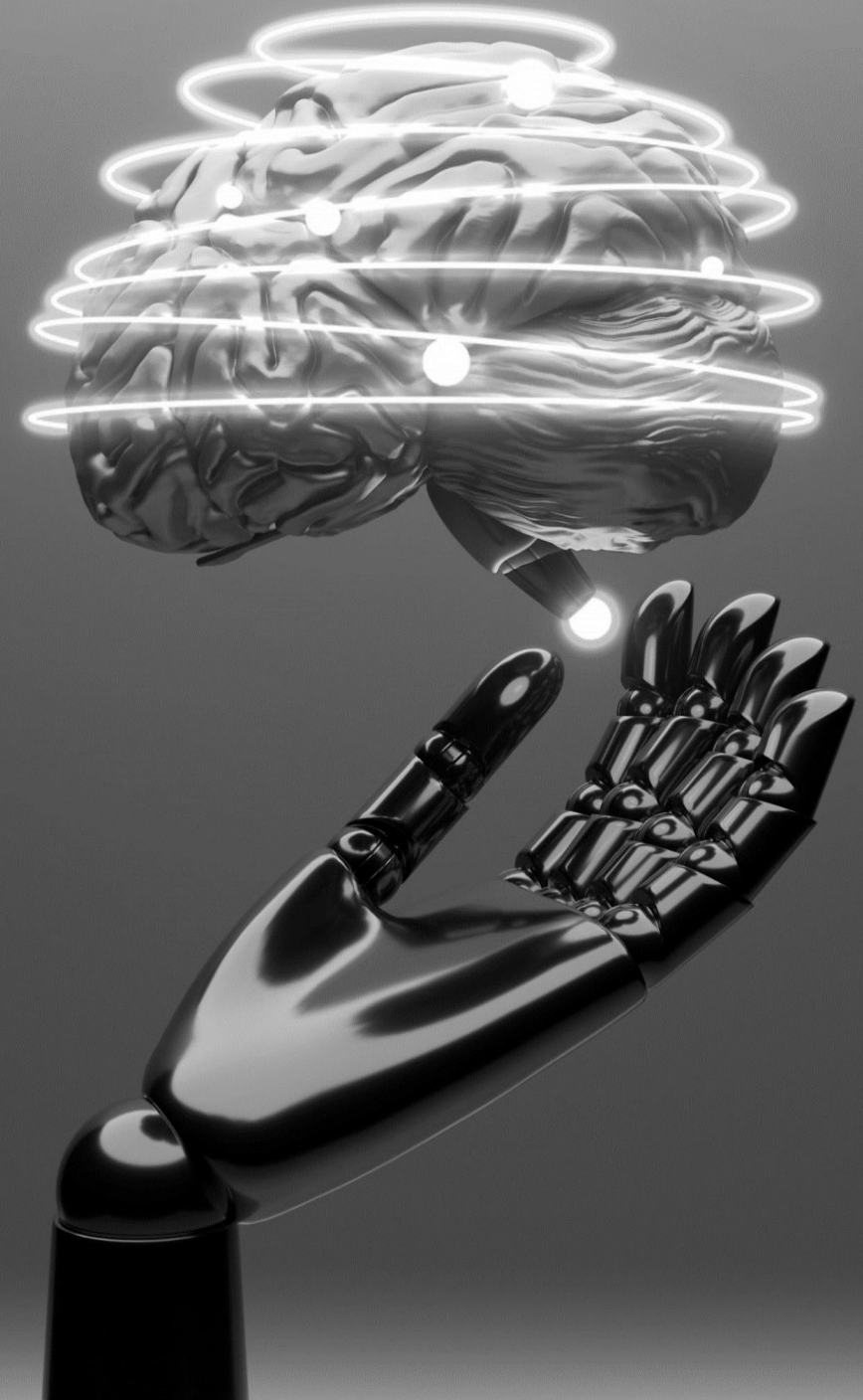


# Copilot Studio in a Day Workshop



## One-Day Workshop on Copilot Studio

- This one-day workshop will teach you how to use Copilot Studio to design and deploy intelligent copilots for your organization.
- You will learn how to create conversational topics, connect copilots to business data and services, and enhance them with automation.
- By the end of the workshop, you will be equipped with the knowledge and skills to build copilots that improve productivity, streamline processes, and deliver better user experiences.





## Approach

- Hands-on Copilot-in-a-Day Workshop
- Overview of Copilot Studio and conversational AI basics
- Guided setup and configuration
- Build conversational topics & flows
- Connect copilots to data sources (Dataverse, SharePoint, APIs)
- Extend copilots with Power Automate actions & plugins
- Design copilots for real HR, IT, or business use cases
- Best practices for usability and adoption
- Collaborative POC copilot development during the session



## Outcomes

- Equip participants to design copilots that improve user experience and efficiency
- Provide discovery and initial POC design
- Co-build 1–2 copilots tailored to real scenarios and review governance best practices
- Enable creating copilots without writing code, integrating data and automation seamlessly
- Build advanced copilots that can handle complex conversations and data lookups
- Realize the value of copilots with rapid deployment in Teams or web channels



## Why

- **Quick Wins:** Demonstrate fast productivity improvements through copilots
- **Hands-On Experience:** Give leaders and users direct exposure to copilot capabilities
- **Resource Optimization:** Free up employee time by offloading routine queries to copilots
- **Competitive Edge:** Show how copilots accelerate adoption of AI in daily work
- **Strategic Alignment:** Align copilots with business objectives for measurable impact
- **Data-Driven Decisions:** Use copilots to surface timely insights and improve decision-making

# Workshop Agenda

| Module                                        | Session Highlights                                                                                                                                              |
|-----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Pre-Setup (Office Hour)</b>                | Environment and license validation.<br>Configure Copilot Studio.<br>Troubleshooting ( <i>Workshop officially begins here.</i> )                                 |
| <b>Part I: Introduction</b>                   | Introduction to Conversational AI and Copilot Studio.<br>Understand the difference between Copilots and Chatbots.                                               |
| <b>10-min break</b>                           |                                                                                                                                                                 |
| <b>Part II: Copilot Basics</b>                | Build your first copilot — create topics, triggers, and responses.<br>Add user inputs and variables.<br>Connect copilots with Power Automate actions.           |
| <b>60- min lunch break</b>                    |                                                                                                                                                                 |
| <b>Part III: Integration &amp; Extensions</b> | Integrate copilots with Dataverse, SharePoint, and Power Automate flows.<br>Extend copilots across Microsoft Teams channels.                                    |
| <b>10-min break</b>                           |                                                                                                                                                                 |
| <b>Part IV: Advanced Scenarios</b>            | Add plugins and external APIs.<br>Use AI Builder for intelligent copilots.<br>Enhance copilots with adaptive cards.                                             |
| <b>10 min break</b>                           |                                                                                                                                                                 |
| <b>Part V: Advanced Topics (Optional)</b>     | Governance and lifecycle management.<br>Implement error handling and fallback strategies.<br>Explore analytics, optimization, and new automation opportunities. |
| <b>10-min break</b>                           |                                                                                                                                                                 |
| <b>Part VI: Closing Session</b>               | Roadmap discussion, licensing overview, best practices, and adoption strategies.<br>Q&A and feedback survey.                                                    |

 **Primary requirements for this lab:** Microsoft Copilot Studio license for each participant with access to Microsoft 365 tenant.

## Set up Copilot Studio environment

- Go to <https://copilotstudio.microsoft.com>
- Sign in with your Microsoft 365 account
- Ensure Dataverse environment is available (or create one)
- Verify access to connectors (SharePoint, Teams, Outlook, etc.)
- Enable Power Automate for extending copilots if required

## Prerequisites:

- Recommended browser: Microsoft Edge or Google Chrome (latest)
- Internet connection
- Microsoft 365 account with Copilot Studio enabled
- Permissions to create apps in Dataverse

## Register your machine:

- Sign into Copilot Studio portal
- Select or create the environment you will use
- Confirm Dataverse is provisioned
- Verify Teams/Web channel setup for publishing copilots



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# Thank You