

Advanced Microsoft 365 Copilot, AI Agents, and Business Process Transformation

CONNECTION TECHNOLOGY 裝備未來
FUTURE SKILLS

This executive-level programme stands out by combining practical Microsoft 365 Copilot applications with advanced AI agent and workflow design concepts in a concise, hands-on format. Unlike traditional courses focused only on features, it emphasizes real business scenarios, cross-functional use cases, and automation opportunities across departments such as sales, finance, and HR. Participants will not only learn how to enhance productivity, but also gain exposure to Copilot Studio, AI agents, and enterprise integration (Microsoft Graph & APIs)—equipping them with the insight to move beyond basic usage toward strategic AI adoption and workflow transformation..

Programme code	P0000311
Duration	13 Aug (9:30-13:00)
Venue	1/F, HKPC Building, 78 Tat Chee Avenue, Kowloon Tong
Medium	Cantonese, supplemented with English terminology
Course fee	HK\$1,800

Trainer Information

Dr Patrick TSOI, he is a trainer with over 28 years hands-on data science, Big Data and programming experiences. He is a Doctor of Education graduate from the Hong Kong Baptist University, Master in IT Education graduate from the University of Hong Kong and B.Eng in System Engineering and Engineering Management from the Chinese University of Hong Kong.



Course Introduction

This 3.5-hour training is an executive-level, advance level of Microsoft 365 Copilot, accompany with cross-functional business use cases, workflow automation, and AI agent implementation in a concise but practical format.

The course focus on:

- Microsoft 365 Copilot for productivity and decision support
- business applications in sales, marketing, finance, HR, and administration
- workflow automation using Microsoft 365 apps and Power Automate
- custom AI agent concepts using Copilot Studio, MCP, Microsoft Graph/APIs
- governance, compliance, privacy, and executive implementation planning

This course is especially suitable for organizations that want a high-level strategic overview with deeper hands-on application and advanced scenario exercises.

Course Objectives

By the end of the 3.5-hour training, participants will be able to:

- Understand the Microsoft 365 Copilot ecosystem and how it supports productivity, communication, reporting, and collaboration.
- Apply Copilot to practical business scenarios across sales, marketing, finance, HR, and administration.
- Identify automation opportunities using tools such as Excel, Word, Outlook, Teams, SharePoint, Power BI, and Power Automate.
- Understand how Copilot Studio, MCP, Microsoft Graph, and APIs extend Copilot into AI agents and intelligent workflows.
- Assess governance, privacy, compliance, and human oversight requirements for enterprise AI deployment.

Draft an executive-level quick-win roadmap for departmental or company-wide adoption.

Course Outline

1. Copilot Overview & Business Value

- Microsoft 365 Copilot ecosystem and key capabilities
- Integration across Word, Excel, Outlook, Teams, Power BI
- Core use cases: drafting, reporting, communication support
- Identifying high-value business opportunities and limitations

2. Cross-Functional Applications

- **Sales & Marketing:** forecasting, campaign insights, reporting
- **Finance:** KPI tracking, analysis, and reporting automation
- **HR & Admin:** document generation, communication, workflow support
- Applying Copilot in daily operations and decision-making
- Data privacy, governance, and compliance considerations

3. Workflow Automation

- Identifying automation opportunities in business processes
- Using Power Automate with Microsoft 365
- Improving efficiency, reporting, and collaboration workflows
- Mapping business pain points to Copilot solutions

4. Copilot Studio & AI Agents

- Introduction to Copilot Studio and AI agent concepts
- Designing simple AI-driven workflows and interactions
- Role of Microsoft Graph, APIs, and enterprise data integration

5. Hands-on Lab & Business Scenarios

- Executive reporting and summary generation
- Cross-functional business use case exercises
- Workflow automation and AI agent design concepts
- Practical application through guided scenarios

6. Governance & Implementation Strategy

- Responsible AI: privacy, compliance, and risk considerations
- Human oversight and secure deployment practices
- Identifying quick wins and adoption challenges
- Best practices for enterprise implementation

7. Wrap-up & Action Planning

- Key use cases and business impact recap
- Developing a quick-win adoption roadmap
- Aligning AI initiatives with business strategy
- Q&A