

Leverage Microsoft 365 Copilot and Copilot Studio for Human Resources

Summary: Duration - 1 day x 8 hours (Theory + Hands-on Labs), Level - 200 (MS Scale), Delivery method - Virtual Instructor-led class or In-class

This course provides comprehensive, hands-on training on leveraging Microsoft 365 Copilot and Copilot Studio to transform and optimize human resource processes. Microsoft 365 Copilot is an AI-powered productivity tool integrated into Microsoft 365 applications such as Word, Excel, PowerPoint, Outlook, and Teams. It utilizes advanced large language models (LLMs), including GPT-4, LLaMA, Mistral, and Phi, to assist with drafting, summarizing, and generating content, as well as providing real-time insights and context-aware suggestions by leveraging data from Microsoft Graph.

Participants will also work with Copilot Studio, a low-code platform featuring over 1,500 prebuilt data connectors that empowers users to build custom AI-driven solutions and automate workflows while maintaining data security and compliance. The curriculum combines focused theory sessions with practical lab exercises where participants apply their knowledge using real-world HR scenarios built around the Contoso Enterprise case study, covering recruitment, internal mobility, employee recognition, and benefits management.

AUDIENCE:

The primary audience of this class are HR professionals, talent acquisition specialists, HR managers, and people operations leads who want to integrate AI tools into their daily workflows. This includes professionals working with Microsoft 365 who seek to improve recruitment processes, employee onboarding, internal job transitions, recognition programs, and benefits management through AI-powered automation.

The secondary audience includes HR business partners, organizational development specialists, HRIS administrators, and anyone interested in understanding how Microsoft Copilot and Copilot Studio can augment modern human resource operations.

Prerequisites:

- Basic knowledge of Microsoft 365 applications (Word, Excel, PowerPoint, Outlook, Teams, SharePoint)
- Familiarity with HR processes such as recruitment, onboarding, and employee management
- Basic understanding of AI prompts and prompt engineering principles
- Introductory awareness of Microsoft Copilot Studio (helpful but not required)

AFTER THE TRAINING ATTENDEES WILL BE ABLE TO:

- Streamline HR recruitment workflows including job descriptions, interview questions, offer letters, and onboarding using Microsoft 365 Copilot
- Facilitate and manage internal job transitions with AI-powered candidate screening, scheduling, and training material creation
- Develop and implement awards and recognition programs using Copilot Studio custom agents
- Automate employee benefits query management using Copilot Chat and Copilot Studio agents in Microsoft Teams
- Set up and configure a SharePoint-based HR onboarding hub to support collaborative HR operations
- Build custom AI agents with Copilot Studio for repetitive HR tasks and employee self-service
- Design reusable AI-powered workflows for end-to-end HR process optimization

TOPICS:

Module 0: SharePoint HR Onboarding Hub Setup (09:30 - 10:15)

This foundational module prepares the learning environment required for all subsequent modules. Participants will create and configure a SharePoint site tailored for HR onboarding operations, establishing the central collaborative hub that underpins all lab exercises. SharePoint serves as the backbone for collaborative HR operations within Microsoft 365 - when integrated with Copilot, it becomes an intelligent data source that AI tools can query to generate insights, manage employee data, support document workflows, and automate routine HR tasks.

<u>Lessons:</u>	<u>Lab:</u>
✓ SharePoint as an HR Data Hub	✓ Create the ContosoOnboardingSite in SharePoint
✓ Site templates for HR onboarding operations	✓ Add a Document Library for HR resources
✓ Document Libraries for HR policies and resources	✓ Upload Files and Folders to the Library
✓ SharePoint Lists for structured employee data	✓ Create a NominationList from Excel import
✓ Integration points with Copilot and Copilot Studio	

Completing these prerequisites ensures readiness to proceed with the subsequent labs. If participants have questions, the instructor will answer in the Q&A session.

After completing this module, you will be able to:

- ✓ Set up a SharePoint site configured for HR onboarding and employee resource management
- ✓ Create and organize document libraries with proper file and folder structures
- ✓ Import employee nomination data from Excel into structured SharePoint lists
- ✓ Understand how SharePoint data feeds into AI-powered Copilot recommendations for HR workflows

Module 1: Streamline HR Recruitment with AI (10:30 --11:45)

Recruitment is one of the most time-consuming and critical functions in HR. From crafting job descriptions and interview questions to researching competitive salaries and drafting offer letters, the traditional hiring process involves extensive manual effort at every stage. This module explores how Microsoft 365 Copilot revolutionizes recruitment by automating and enhancing each step of the hiring lifecycle. Participants will learn how AI can ensure consistency in HR practices, reduce time-to-hire, improve candidate experience, and enable HR professionals to focus on strategic decision-making rather than administrative tasks.

The theory portion covers modern recruitment best practices, AI-assisted job description writing that attracts diverse talent, structured interview design principles, compensation benchmarking methodologies, effective offer letter communication, and the critical role of onboarding in employee retention. Participants will also learn how to build a custom Copilot Studio agent that helps new employees navigate their onboarding journey through self-service Q&A capabilities.

<u>Lessons:</u>	<u>Lab:</u>
✓ Modern recruitment lifecycle and AI integration	✓ Create a Job Description using Copilot
✓ AI-powered job description writing best practices	✓ Generate Structured Interview Questions
✓ Structured interview design and question generation	✓ Research Salary Levels with AI
✓ Compensation benchmarking with AI research	✓ Draft an Offer Letter using Copilot
✓ Effective offer letter and onboarding communication	✓ Create Onboarding Materials

✓ Building onboarding agents with Copilot Studio	✓ Draft an Introduction Email
✓ Employee self-service through custom AI agents	✓ Build an Onboarding Q&A Agent in Copilot Studio

After completing this module, you will be able to:

- ✓ Use Microsoft 365 Copilot to create professional, inclusive job descriptions efficiently
- ✓ Generate role-specific structured interview questions using AI
- ✓ Conduct AI-powered salary research and competitive compensation benchmarking
- ✓ Draft personalized offer letters and onboarding materials with Copilot
- ✓ Build a custom Copilot Studio agent to support employee onboarding self-service

Module 2: Manage Internal Job Transitions with AI (12:00 - 13:30)

Internal mobility is a key driver of employee engagement and organizational agility. However, managing internal job transitions involves complex coordination – from identifying suitable candidates and screening applications, through scheduling interviews and developing training plans, to collecting feedback and monitoring performance in the new role. This module demonstrates how Microsoft 365 Copilot streamlines this entire process, helping HR teams optimize internal hiring practices and support smooth transitions that benefit both employees and the organization.

The theory portion covers internal mobility strategy and its impact on retention, AI-assisted candidate screening and matching techniques, efficient interview scheduling workflows, personalized training plan development, and feedback collection frameworks. Participants will understand how Copilot can synthesize employee data to identify high-potential internal candidates, generate tailored transition plans, and create effective communication materials throughout the transition lifecycle.

<u>Lessons:</u>	<u>Lab:</u>
✓ Internal mobility strategy and retention impact	✓ Screen Internal Candidates with Copilot
✓ AI-assisted candidate screening and matching	✓ Schedule Interviews using AI Assistance

✓ Interview scheduling and coordination workflows	✓ Develop Training Materials for Role Transitions
✓ Personalized training and development planning	✓ Collect and Analyze Transition Feedback
✓ Feedback collection and transition assessment	

After completing this module, you will be able to:

- ✓ Use Copilot to efficiently screen and identify suitable internal candidates for open positions
- ✓ Automate interview scheduling and coordination through AI-powered tools
- ✓ Generate customized training materials for employees transitioning to new roles
- ✓ Collect and analyze structured feedback to ensure successful role transitions
- ✓ Support smooth internal mobility that improves employee satisfaction and organizational agility

Module 3: Implement Awards & Recognition Programs with AI (09:30 - 11:00)

Employee recognition is a fundamental pillar of organizational culture and engagement. Well-designed awards and recognition programs foster transparency, motivation, and a sense of belonging. However, managing nominations, generating summaries, tracking recognitions, and ensuring program visibility requires significant administrative effort. This module demonstrates how Copilot Studio can automate the entire awards and recognition lifecycle through a custom prebuilt agent that streamlines nomination creation, summary generation, review workflows, and recognition tracking.

The theory portion covers recognition program design principles, the psychology of employee appreciation, best practices for inclusive nomination processes, and how AI agents can ensure transparency and fairness in recognition programs. Participants will learn how to configure and deploy a Copilot Studio Awards and Recognition agent that integrates with SharePoint data, enabling a seamless experience for both nominators and HR administrators while fostering a culture of celebration and achievement.

<u>Lessons:</u>	<u>Lab:</u>
✓ Recognition program design and best practices	✓ Create a Nomination using the AI Agent

✓ Psychology of employee appreciation and engagement	✓ Generate a Nomination Summary with Copilot
✓ Inclusive nomination process design	✓ View and Review Recognition Records
✓ Building recognition agents with Copilot Studio	✓ View and Track All Nominations
✓ SharePoint integration for nomination tracking	
✓ Transparency and fairness in AI-powered recognition	

After completing this module, you will be able to:

- ✓ Configure and deploy a Copilot Studio Awards and Recognition agent for the organization
- ✓ Create employee nominations through an intuitive AI-powered interface
- ✓ Generate professional nomination summaries automatically using Copilot
- ✓ Review, track, and manage recognition records through the integrated agent
- ✓ Foster a transparent and engaging culture of employee appreciation powered by AI

Module 4: Automate Benefits Query Management with AI (11:45 - 13:30)

Managing employee benefits queries is a high-volume, repetitive task that consumes significant HR resources. Employees frequently have questions about health plans, retirement options, leave policies, and enrollment procedures - and they expect timely, accurate answers. This module demonstrates how to create a comprehensive automated solution using Microsoft Copilot Chat and Copilot Studio that reduces HR workload, ensures consistent and accurate responses, and improves employee satisfaction through self-service capabilities.

The theory portion covers benefits communication strategies, the design of conversational AI agents for HR self-service, personalization techniques for benefits recommendations, automated feedback collection and analysis, and best practices for integrating AI agents into Microsoft Teams. Participants will build a custom Helpdesk Agent that provides detailed benefits analysis, personalized recommendations, draft plan update announcements, resolve common issues, and collect employee feedback all within the familiar Teams environment.

<u>Lessons:</u>	<u>Lab:</u>
✓ Benefits communication and self-service strategy	✓ Configure the Employee Onboarding Helpdesk Agent
✓ Conversational AI design for HR helpdesks	✓ Perform Benefits Analysis with the AI Agent
✓ Personalization techniques for benefits advice	✓ Generate Personalized Benefits Recommendations
✓ Automated issue resolution and escalation	✓ Draft Benefits Plan Update Announcements
✓ Feedback collection and continuous improvement	✓ Research and Resolve Common Benefits Issues
✓ Teams integration for AI agents	✓ Automate Feedback Collection and Analysis

After completing this module, you will be able to:

- ✓ Deploy a custom Employee Onboarding Helpdesk Agent using Copilot Studio in Microsoft Teams
- ✓ Perform comprehensive benefits analysis and generate personalized recommendations with AI
- ✓ Draft professional benefits plan update announcements using the AI agent
- ✓ Research and resolve common employee benefits issues through automated workflows
- ✓ Collect and analyze employee feedback to continuously improve benefits programs