

COURSE 2

# Building AI Agents with Copilot Studio

Design, build and govern AI agents that work for you, without writing a line of code

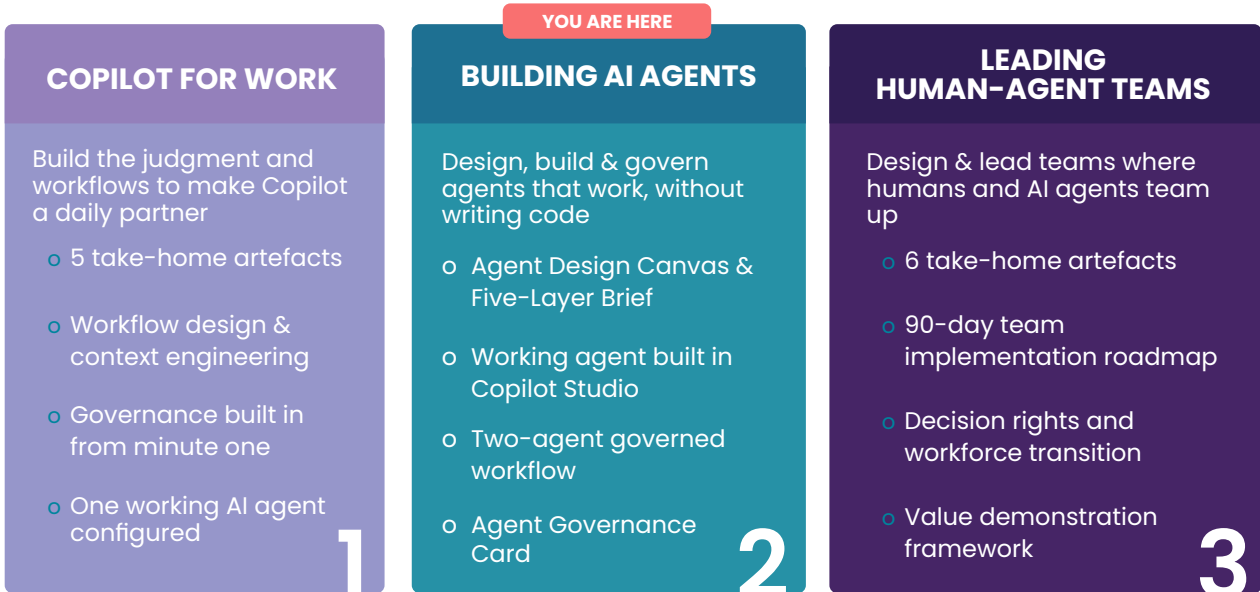


**pm-partners**

# The complete AI Capability Program for Australian professionals



Three courses. One program. The most complete AI training suite in Australia.



## THE VALUE OF ALL THREE, TOGETHER

Each course stands alone and delivers immediate, tangible value. The three courses are designed as a progressive arc, each building the foundation for the next. Participants move from individual AI skill (**Course 1 | Copilot for work**) to building the tools that handle execution (**Course 2 | Building AI agents**) to leading the team that directs both (**Course 3 | Leading human-agents teams**).

The sixteen artefacts produced across the three courses form a complete AI adoption toolkit: personal governance frameworks, workflow canvases, configured agents, governance cards, decision rights frameworks, and a 90-day team implementation roadmap.

**No other program in Australia delivers this breadth of concrete, immediately deployable outputs.**

### For government agencies

The APS AI Plan 2025 commits every public servant to AI training and tool access. The DTA mandatory training deadline has passed. GovAI agents are rolling out. But the practical, tool-specific, leadership-level training that turns that policy into capability, at the individual, agent, and team level, does not exist anywhere else in the market. **This program is that training.**

### For private sector organisations

M365 Copilot licences are deployed but underused. Competitors are deploying agents. The leadership layer is unprepared for human-agent teams. Three separate problems, three separate investments in solving them. This program addresses all three in a single suite that can be delivered individually or as a complete program. **Individual. Agent. Team. All three, solved.**

**No other training provider in Australia offers all three layers of AI capability in a single, coherent program.** Individual skills. Agent capability. Team leadership. All human-led. All governance-aligned. All built for Australia.





Course duration: 1 day

## Design, build and govern AI agents that work for you – without writing a line of code

Building AI Agents with Copilot Studio is a highly practical, one-day learning experience structured around a two-stage arc.

**Stage 1 – Agent Thinking.** The morning is entirely platform-agnostic. Participants develop a durable mental model of what agents are, how to evaluate whether a task is suitable for agent automation, how to design for human-AI handoffs, and how to write a structured agent brief. No tool is opened. The thinking comes first.

**Stage 2 – Agent Building.** The afternoon is entirely hands-on in Microsoft Copilot Studio. Every build decision is anchored to the design work completed in the morning. Participants create, test, and refine a working agent, then connect two agents in a governed workflow with a human approval gate.

This is not a Copilot Studio feature tour. Participants work with real professional scenarios throughout the day, producing artefacts they can deploy, share, and build on immediately.

**Through structured frameworks and a purpose-built companion app, participants will learn to:**

- Evaluate any task using a practical framework that determines whether it is suitable for agent automation
- Design a human-centred agent using the Agent Design Canvas, before opening any tool
- Write a Five-Layer Agent Brief that gives an AI agent a clear identity, purpose, knowledge, behaviour, and guardrails
- Build and configure a working agent in Microsoft Copilot Studio without writing code
- Ground an agent in organisational knowledge using SharePoint, uploaded documents, and web sources
- Test an agent systematically using a four-category framework that includes governance testing
- Connect two agents in a multi-step workflow with a human approval gate embedded at the right point
- Govern every agent they build with a named owner, a review cycle, defined limits, and compliance alignment



## Objectives

---

This course will enable participants to:

- Apply a non-technical agent design framework to evaluate, plan, and scope AI agents before any configuration begins
- Write structured agent instructions using the Five-Layer Agent Brief, a framework that works across any AI platform
- Build and configure a functional agent in Microsoft Copilot Studio tailored to a real professional use case
- Connect agents in a multi-step workflow with human approval gates embedded at the right decision points
- Test agents systematically against accuracy, scope, behaviour, and governance criteria, not just functionality
- Apply graduated autonomy principles to determine the appropriate level of human oversight for each agent and workflow
- Complete an Agent Governance Card that documents ownership, review schedule, compliance status, and success metrics
- Leave with a 30-day agent practice plan grounded in their specific professional context

## Key topics

---

- What makes an agent different from a chatbot or a prompt, the mental model every non-technical builder needs
- A four-question evaluation framework, “Is this an agent job?”, used to assess repetition, structure, accuracy tolerance and success metrics.
- The low-precision versus high-precision framework for identifying safe starting points for agent automation
- The Agent Design Canvas, a five-field planning tool covering purpose, audience, knowledge, guardrails, and human anchor points
- Graduated autonomy, designing the right level of human oversight, from always-approve to monitor-and-exception
- The Five-Layer Agent Brief, identity, purpose, knowledge, behaviour, and guardrails – applied to Copilot Studio agent instructions
- Building and configuring agents in Microsoft Copilot Studio using natural language creation and the instructions field
- Knowledge sources, including document readiness, SharePoint grounding, and the limits of organisational knowledge in agents
- Systematic agent testing using a four-category test framework covering accuracy, scope, behaviour, and guardrails
- Multi-agent workflows, connecting agents with defined handoffs and human approval gates using agent flows in Copilot Studio
- Agent governance, ownership, review cycles, defined limits, compliance alignment, and success metrics
- Australian governance context, responsible and ethical agent deployment aligned to current regulatory frameworks



## Practical scenarios covered

---

Throughout the day, participants apply the agent design and build frameworks to real professional challenges drawn from their own work context. Scenarios are adapted by the facilitator to the professional setting of the cohort.

1. Evaluate three real tasks from their role using the "Is this an agent job?" framework, identifying one strong candidate to build during the day
2. Complete an Agent Design Canvas for their chosen scenario, defining purpose, audience, knowledge, guardrails and human anchor points, then peer review a colleague's canvas
3. Write a Five-Layer Agent Brief from their completed canvas, creating structured instructions ready for Copilot Studio
4. Build and configure their first agent in Copilot Studio, ground it in a relevant knowledge source, and run a structured five-scenario test cycle
5. Design and partially configure a second, complementary agent, then connect both in a workflow with a human approval gate
6. Complete an Agent Governance Card for each agent, documenting ownership, review cycle, compliance status and success metrics

## The five take-home artefacts

---

Every participant leaves with five completed artefacts built during the day from their own professional context. These are not templates, they are working documents designed to be used the following week.

### Built during the day. Deployed beyond the day.

1. **Agent Design Canvas.** A scoped, peer-reviewed design for an agent tailored to a task the participant owns
2. **Five-Layer Agent Brief.** A structured instruction document ready to enter directly into Copilot Studio
3. **Configured Agent.** A working agent built in Copilot Studio, grounded in organisational knowledge and tested against five scenarios
4. **Two-Agent Workflow Design.** A connected, governed workflow with a human approval gate, partially or fully configured in Copilot Studio
5. **Agent Governance Card.** An accountability document covering ownership, review schedule, compliance status, and success metrics for each agent built



## Who is this course for?

This course is designed for any professional who wants to move beyond using AI as a conversation tool to directing AI as a working system. It is built for non-technical people. No coding background is required or assumed. The only prerequisite is professional curiosity and a real problem worth solving with an agent.

Prior completion of Human-Led, AI-Powered: Microsoft Copilot for Work is advantageous but not required. Participants who have completed the introduction course will find this a natural and powerful next step. Participants who have not will find the course designed to be entered directly, provided they have a working familiarity with Microsoft 365 Copilot.

### GOVERNMENT AND PUBLIC SECTOR

- APS officers and managers seeking to automate recurring workflows
- Policy advisors and analysts who spend significant time on research, compilation, and drafting
- Program and project managers looking to reduce administrative coordination overhead
- Communications and engagement professionals managing content and knowledge workflows
- Corporate services and operations teams with high-volume, structured process work

### PRIVATE SECTOR AND PROFESSIONAL SERVICES

- Managers and team leaders at all levels looking to scale their team's output through agent workflows
- Finance, HR and operations professionals with recurring, data-intensive process work
- Marketing and communications teams managing content production and distribution workflows
- Legal, compliance and risk professionals seeking governed, auditable AI support
- Knowledge workers and strategic advisors who want to direct AI systems rather than just use them

## BYOD REQUIREMENTS

This is an immersive, hands-on course. **Participants must bring their work device with an active M365 Copilot licence.**

Copilot Studio must be accessible through their organisational licence. Participants unsure of their Copilot Studio access should check with their IT team before attending.

### Participants should:

- Hold an active Microsoft 365 Copilot licence (M365 Business or Enterprise add-on, provided through their organisation)
- Have working familiarity with the Microsoft 365 suite. Particularly Outlook, Teams, and SharePoint
- Be a practising professional with a real workflow or recurring task they want to address through agent design
- No coding experience or technical AI background is required. The course is built for business professionals, not developers



## Course delivery

---

This course is delivered live by a certified facilitator using a highly practical, structured format. The day follows a 30/70 facilitation-to-activity ratio. Participants spend the majority of the day thinking, designing, and building, not watching.

### Participants will:

- Work through a structured two-stage arc. Agent thinking in the morning, agent building in the afternoon
- Complete design exercises in the companion app before opening Copilot Studio, so every build decision is deliberate
- Build and test agents directly in Copilot Studio using their own professional scenarios
- Participate in facilitated peer review activities. Reviewing each other's design canvases and governance cards
- Leave with five completed artefacts and a 30-day agent practice plan ready for immediate use

### Course delivery options:

- Face-to-face at your organisation's premises
- Virtually via live online facilitation
- Customised for specific teams, divisions or professional cohorts

Learn more about our virtual training [here](#).

## Australian governance alignment

---

Responsible and ethical AI use is not a standalone module. It is embedded throughout every stage, from the Agent Design Canvas to the Agent Governance Card. Governance thinking is built into the design before any tool is used, so participants create agents that are accountable by design, not as an afterthought.

The course addresses responsible agent deployment in the Australian context, with reference to the Policy for Responsible Use of AI in Government, the DTA Guidance for AI Adoption, Six Essential Practices, and Privacy Act 1988 obligations for data handling in AI systems. Every agent built during the day includes a compliance check as part of the Agent Governance Card.

# Why learn with PM-Partners?

For over 25 years, PM-Partners has helped organisations uplift capability across Australia, New Zealand and South-East Asia. Our facilitators are experienced practitioners who combine real-world expertise with best-practice delivery methods. **We don't just teach AI. We show you how to apply it to create real learning impact.**

## Because we turn your career goals into reality.

Poor project skills are consistently cited as a key reason for project failure. To be successful in project delivery, it's critical to invest in yourself and the capabilities of your team.

Certification and training are a critical part of that journey. But you need to know which steps to take, and when, to ensure you're heading in the right direction. That's where our expert guidance and support comes in.

## Tell us where you want to go

At PM-Partners, we start every conversation with the question, 'Where are you trying to go?' We then apply our expertise to show you exactly 'how' to get there.

We believe that having the relevant skills and methodologies is critical to delivery success, and ultimately career success. Depending on your aims, our team of professional development consultants will work closely with you to create a development pathway, or team training program, that aligns with your goals.

## Helping to build capability for over 25 years

Our accredited programs provide certification and development across a range of globally recognised project management and delivery streams.

Each year, our expert facilitators train and certify more than 15,000 people throughout Australia, New Zealand and South-East Asia to best practice standards. All are highly qualified practitioners in their field, and they draw from real-life scenarios and their own experience to add real value for individuals, teams and organisations.

## Our promise to you

PM-Partners is committed to providing industry leading education that is relevant, up-to-date and designed to meet your specific needs.

We offer qualifications across multiple disciplines, including key products in PeopleCert's best practice portfolio, such as ITIL®, PRINCE2® Project Management, PRINCE2® Agile Project Management, PRINCE2® Programme Management, Prince2® Portfolio Management, and P3O®; APMG's AgilePM®, AgileBA®, AgilePgM™, Lean Six Sigma, Managing Benefits and Change Management; as well as the Scaled Agile Framework® (SAFe®); and Business Analysis programs from The Australian Chapter of the International Institute of Business Analysis™ (IIBA®), to name a few.

To learn more about how we can support you or your organisation, contact our team on 1300 70 13 14.



**Jourdan Clark**  
Sales Manager



**Marcus Gilroy**  
Corporate Training  
Sales Consultant



**Holly Barber**  
Corporate Training  
Sales Consultant



**Michael Lipman**  
Corporate Training  
Sales Consultant



**Luke Ayres**  
Corporate Training  
Sales Consultant



**Luis Sylvester**  
Corporate Training  
Sales Consultant



**Faye Hughes**  
Public Training Sales  
Consultant



**Hannah McGuire**  
Public Training Sales  
Consultant

25

years of  
customer results

15,000

people trained  
annually

4

integrated  
service lines

85,000

resources  
globally

17.6

average years'  
experience of our  
senior advisors

52%

of all our courses  
incorporate Agile

41

globally  
recognised  
certifications and  
accreditations

\$3bn

projects and  
programmes  
delivered annually

310

experts across  
Australia and  
ASEAN

80%

of the top 200  
ASX companies

16

best practice global  
methodologies and  
frameworks

99%

first time  
pass rate for  
certifications

**pm-partners**



PM-Partners has been a leader in training and professional certification for over 20 years.

Our trainers are highly qualified practitioners in their chosen fields.



## Contact us:

### SYDNEY OFFICE

Level 5  
45 Clarence Street  
Sydney NSW 2000  
Phone: 1300 70 13 14

### MELBOURNE OFFICE

Level 8  
34 Queen Street  
Melbourne VIC 3000  
Phone: 1300 70 13 14

### BRISBANE OFFICE

Level 24  
215 Adelaide St  
Brisbane QLD 4000  
Phone: 1300 70 13 14

### CANBERRA OFFICE

Level 4 & 5  
15 Moore Street  
Canberra ACT 2601  
Phone: 1300 70 13 14

### PERTH OFFICE

Level 1  
111 St Georges Terrace  
Perth WA 6000  
Phone: 1300 70 13 14

### SINGAPORE OFFICE

20 Bendemeer  
Road #03-12  
Singapore 339914  
Phone: +65 6818 5771

[info@pm-partners.com.au](mailto:info@pm-partners.com.au) | [www.pm-partners.com.au](http://www.pm-partners.com.au)

Share this course:



**pm-partners**