

AB-730 Exam Cheatsheet

AI Business Professional | High-yield review in 5 pages

Use generative AI productivity tools to improve daily work, drive business outcomes, and make informed decisions - without building AI apps or writing code.

Exam blueprint

Skill area	Weight	What to remember
1. Generative AI fundamentals	25-30%	Capabilities, context, privacy, responsible AI, verification
2. Prompts and chats	20-25%	Effective prompts, resources, save/schedule/share, memory, chat management, Notebooks
3. Business content and collaboration	20-25%	Connectors, Work IQ, cross-app content, visuals, meetings, Pages
4. Business outcomes with agents	20-25%	Prebuilt agents, Copilot Cowork, skills, delegation, review, scheduling

Important date note

The Microsoft page is currently labeled **Skills measured as of October 20, 2026**. Since this cheatsheet was created before that date, confirm the live exam blueprint on Microsoft Learn before booking or sitting the exam.

Candidate profile

- Hands-on with Microsoft 365 Copilot, Copilot Cowork, and prebuilt agents
- Understands prompt engineering, context engineering, and large language models
- Comfortable in Outlook, Word, Teams, PowerPoint, and Excel

Quick exam facts

- Passing score shown in the guide: 700 or greater
- Most questions cover generally available features
- Preview features may appear when commonly used
- Use the exam sandbox and request accommodations if needed

1. Understand generative AI fundamentals

Highest-weight domain: focus on choosing the right Copilot experience, grounding/context, privacy, and safe use.

How context shapes responses

- Work IQ: business context from your work and organization
- Web data: external, current information when appropriate
- App context: the Microsoft 365 app and content you are working in
- Prompt quality and referenced resources affect relevance

Choose the experience

- Microsoft 365 Copilot Chat: conversational assistance and grounded work
- Agents: focused support for defined scenarios or workflows
- Copilot Cowork: delegated, multi-step business work
- App Copilot: work inside Outlook, Word, Teams, PowerPoint, or Excel

Responsible AI and data protection

Risk	Best response
Inaccuracies	Check citations, source content, calculations, and business facts; use human review.
Prompt injection	Treat untrusted instructions in external content cautiously; verify requested actions and sources.
Over-reliance	Use AI as assistance, not final authority; apply business judgment and accountable review.
Sensitive data exposure	Use only approved data, respect access controls, and avoid unnecessary sensitive details.
Restricted results	Expect data protection and permissions to limit what Copilot can retrieve or return.

Verification checklist

- Does the response answer the exact business question?
- Are citations present and do they support the claim?
- Are figures, names, dates, and assumptions correct?
- Does the output comply with privacy and data handling rules?
- Is a qualified human required to approve the result?

Exam decision rule

Prefer the option that uses the **least necessary data**, checks source evidence, keeps a human accountable, and matches the Copilot experience to the task. Secure and verifiable beats fast but unchecked.

2. Manage prompts and chats

Build prompts systematically, refine from the response, and know how chats, memory, instructions, and Notebooks are managed.

What outcome is needed?	Audience, situation, constraints	Files, pages, messages, web, or app content	Format, tone, length, quality checks

Prompt lifecycle

- Create an effective prompt and select the suitable model
- Reference the most relevant resources
- Review output for omissions, errors, and unsupported assumptions
- Refine the prompt using the result
- Save useful prompts
- Schedule repeatable prompts
- Share prompts when teamwork benefits

Chat management

- Find a previous chat
- Rename a chat for easy retrieval
- Delete a chat when no longer needed
- Understand how memory and instructions influence responses
- Use Notebooks to organize and share information

High-yield prompt patterns

Need	Prompt pattern
Summarize	Summarize [source] for [audience]. Focus on [topics]. Return [format]. Flag missing or uncertain information.
Compare	Compare [A] and [B] against [criteria]. Use only [sources]. Show differences, risks, and a recommendation.
Create	Create [deliverable] for [audience/purpose] using [sources]. Use [tone/structure]. Include [required elements].
Analyze	Analyze [content/data] to identify [insights]. Explain evidence, assumptions, and items requiring validation.

Model and resource selection

Choose the model and sources that fit the task. Use authoritative, relevant, permitted resources. More context is not automatically better; include what helps the model deliver the required business outcome.

3. Business content and collaboration

Use Copilot across Microsoft 365 to create, analyze, visualize, meet, and collaborate - while validating business fit.

Content and analysis

- Connect to sources beyond Microsoft 365 Copilot by using connectors
- Use specific business context, including Work IQ and connectors
- Generate or analyze content across Word, Excel, and PowerPoint
- Create images, visuals, and charts to support the message
- Derive insights across Work IQ
- Validate that output meets business goals

Meetings and collaboration

- Prepare for a meeting
- Use the Facilitator agent
- Use real-time catchup
- Use Intelligent recap
- Collaborate on business content using Copilot Pages

Scenario map

Draft a customer update	Create from approved context in Word or Outlook	Accuracy, tone, audience, confidentiality
Find trends in business data	Analyze in Excel; create charts if they improve understanding	Source range, calculations, labels, interpretation
Build an executive presentation	Generate and refine in PowerPoint using cross-app sources	Narrative, evidence, visual clarity, decision relevance
Prepare for a meeting	Use relevant meeting context and preparation capabilities	Objectives, open decisions, risks, stakeholders
Catch up during/after meeting	Real-time catchup or Intelligent recap, as appropriate	Confirm decisions, owners, deadlines in source
Co-author a working brief	Use Copilot Pages to organize and collaborate	Current version, access, attribution, completeness

Business outcome test

Before accepting an AI output: Is it relevant to the goal? Grounded in authorized context? Factually verified? Clear for the target audience? Actionable? Compliant with organizational requirements?

4. Drive business outcomes with agents

Know when to select a prebuilt agent, when a custom agent may be needed, and how Copilot Cowork handles multi-step work.

Prebuilt Microsoft 365 Copilot agents

- Identify workflows improved by a prebuilt agent
- Choose between a prebuilt agent and creating a custom agent
- Apply an agent from Microsoft 365 Copilot experiences
- Filter chats by agents

Microsoft Copilot Cowork

- Carries out multi-step business tasks
- Uses skills to complete parts of a task
- Supports prebuilt and custom skill choices
- Lets you delegate work and review the plan, progress, and results
- Includes security considerations and known limitations
- Supports management of scheduled tasks or prompts

Decision framework

Matches a common, defined workflow	Start with a prebuilt agent.
Requires organization-specific behavior or knowledge	A custom agent may be more suitable.
Requires several coordinated steps	Consider Copilot Cowork and review its plan before relying on results.
Can be completed by a known reusable capability	Choose a suitable skill, prebuilt or custom.
Runs repeatedly on a schedule	Manage it as a scheduled task or prompt and review outputs.

Last-minute review checklist

CHECK	What to be ready to explain
1	Memorize the four domains and their percentage ranges.
2	Explain how Work IQ, web data, and app context affect responses.
3	Recognize inaccuracies, prompt injection, over-reliance, and sensitive-data risks.
4	Use citation checks and human review as verification steps.
5	Build prompts with goal, context, source, and expectations.
6	Know save, schedule, share, refine, memory, instructions, and chat management.
7	Match Word, Excel, PowerPoint, Teams, Pages, and meeting capabilities to scenarios.
8	Distinguish prebuilt agents, custom agents, Cowork, and skills.
9	For Cowork, review plan, progress, results, security, and limitations.

Source and version check

Built from the official Microsoft Learn study guide: [Study guide for Exam AB-730](#). The guide says it was last updated on September 18, 2026 and labels the listed blueprint as effective October 20, 2026. Recheck the page for later changes.