

# Speaker Guidance

Purpose	Technical deep dive into building agents with Copilot Studio
Audience	Technical Decision Makers (TDMs)
Usage guidance	This is a technical pitch deck for Copilot Studio. Please refer to our other L100 decks for more information on Copilot Studio, M365 Copilot extensibility, Azure integration and more.
Level	L300
Deck owner	Copilot Studio Inbound Product Marketing Team
Last edited	October 2025
Confidentiality	<b>DO NOT SHARE THIS CONTENT ON SOCIAL MEDIA.</b> This deck is only to be used in 1-1 customer conversations.

You are here

# FY26 Field Guide

**Simplification of  
assets and ease of  
discoverability**

Planning to land  
infographic with clear  
structure and go do's  
for sellers on how to  
use the BOM

## Listen & Consult

ATU

AI Halo Pitch Deck | L100

Cross-Solution Area Deck | L100

## Inspire & Design

STU

Hero Solution Play Pitch Deck | L200

Customer Scenario 1  
Modernize with intelligent apps | L200

Customer Scenario 2  
Agent-powered business processes | L200

MCS and Low Code Customer Stories | Slide Library Deck

### TDM Product Pitch Decks

Copilot Studio  
TDM | L300

Power Apps  
TDM | L300

Power Automate  
TDM | L300

Power Pages  
TDM | L300

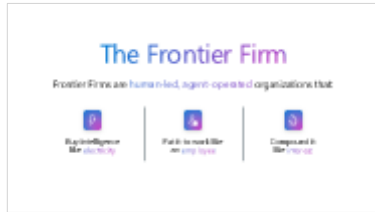
Governance & Security  
TDM | L300

Dataverse  
TDM | L300

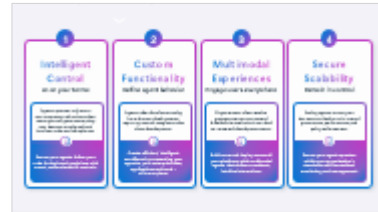
# Storyboard

In presentation mode, click the image to navigate to that slide. If you're not in presentation mode, right click on the image and select 'go to slide'.

## Main content

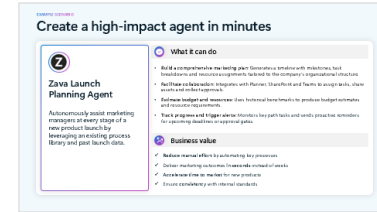


Intro



Core capabilities

1. Intelligent control
2. Custom functionality
3. Multimodal experiences
4. Secure scalability



Building an agent walkthrough



Wrap up

## Appendix



Lite vs full experience



Models



Orchestration



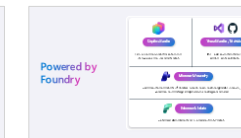
Knowledge



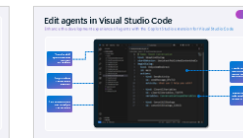
Connectors



Tools



Microsoft Foundry



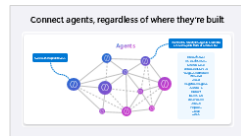
Visual Studio



Multi-agents



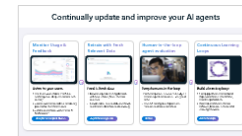
Prebuilt agents



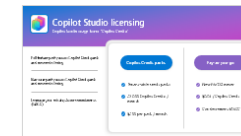
Bring your own agent



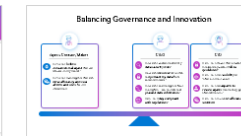
D365 Contact Center



Analytics



Cost management



Security & governance



Global availability



Scenarios & use cases

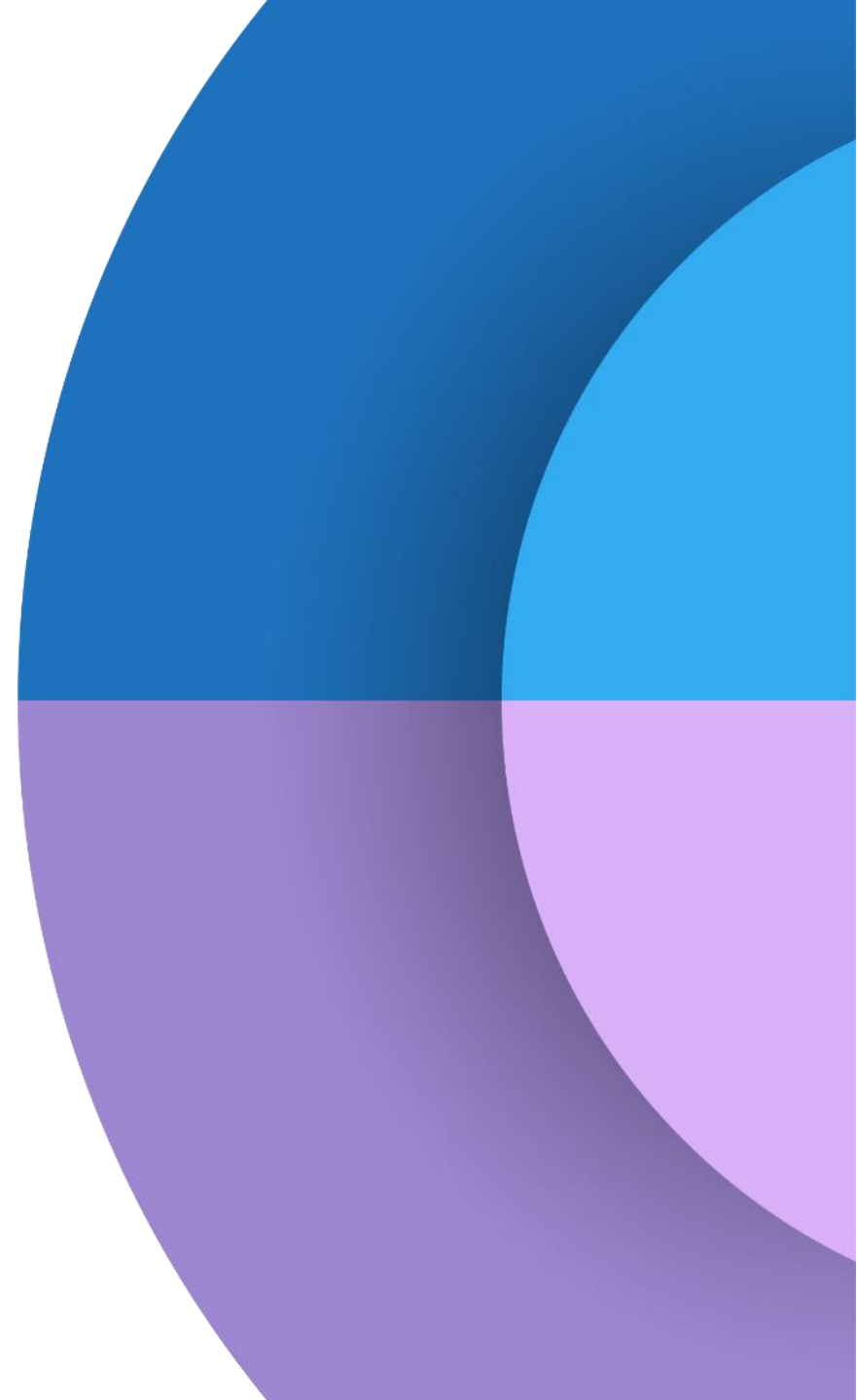


Customer stories



# Copilot Studio

Unlock Copilot's full potential. Build agents. Stay in control.



# The Frontier Firm

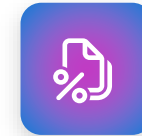
Frontier Firms are **human-led, agent-operated** organizations that:



Buy intelligence  
like **electricity**



Put it to work like  
an **employee**



Compound it  
like **interest**

# Journey to the Frontier Firm

## Pattern 1

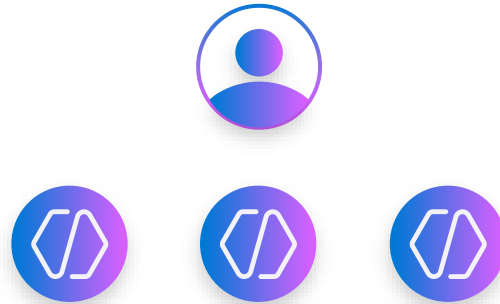
### AI assistant



Every employee has an AI assistant that helps them work better and faster

## Pattern 2

### Human-led agent teams



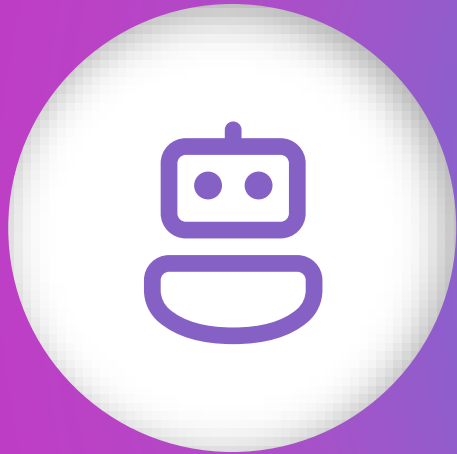
Agents join teams as "digital colleagues," taking on specific tasks at human direction

## Pattern 3

### Human-led, agent-operated



Humans set direction and agents run entire business processes and workflows, checking in as needed



# 1.3 Billion

AI agents by 2028



**Microsoft 365 Copilot**



**Copilot Chat**

Extensibility with



**Copilot Studio**

## USER-LED

Unlock innovation at every level, department & function

Apply new technology to existing problems to optimize

Fast and iterative



# Today

Apply existing technology to an **existing problem** to optimize existing processes



## ORG-LED

Create business-changing agents

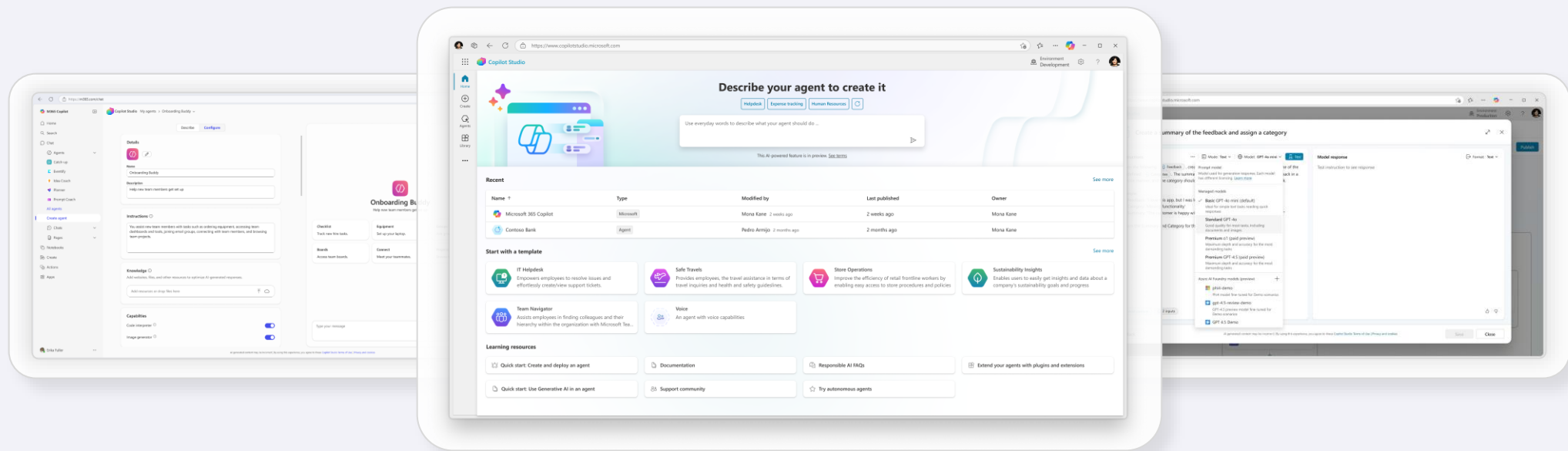
Apply new technology to new opportunities

Top-down approach



# Microsoft Copilot Studio

Build, manage and secure AI agents



## M365 Copilot agent builder

Build agents with natural language right inside Microsoft 365 Copilot

## Copilot Studio

Access a complete set of intuitive tools and capabilities for building agents

## Advanced extensibility

Customize agents using pro dev tools like Microsoft 365 Agents SDK, VS code & Microsoft Foundry

# Build & deploy agents quickly – without worrying about infrastructure

## One ecosystem

Connect to everything  
with Microsoft

- ✓ Easily access existing backend systems
- ✓ Bring together agents built anywhere
- ✓ Improve ROI

## Managed SaaS

Accelerate innovation  
without overhead

- ✓ Quickly develop and deploy at scale
- ✓ Reduce development and maintenance costs
- ✓ Maintain control with built-in compliance, security and governance features

## Intuitive platform

Easily build any agent

- ✓ Easily select your own knowledge, models, tools & channels
- ✓ Rapidly prototype using natural language
- ✓ Enable your whole org to develop custom solutions

# Unlock real value for your organization

Projected benefits of using agents over 3 years with Copilot Studio

Up to

**\$88  
million**

## Cost savings

due to less reliance on outsourcing costs for contractors, professional services, or agencies

Up to

**\$11  
million**

## Increase to net income

due to increase in leads, win rate, and customer retention

Up to

**314%**

## ROI

based on total benefits and costs to the organization



of the Fortune 500 have used Copilot Studio, Copilot's native agent platform



Built an agent with over 20 data sources to provide employee support, **reducing costs by 25%**.



An agent automates the shipping invoice process. **Millions of dollars saved in the first year** on shipping operations.



Built nine autonomous business operations and industry agents, resulting in **40% increase in operational efficiency**; saw a **10-20% increase in customer satisfaction scores** and **15% cost reduction**



**Saved \$1.1M in helpdesk support and** saved one account team **840 hours per year**, improving overall service for customers



Experienced **10x faster fraud detection** and were able to process **20x more case per day** with their fraud detection agent



Marketing team's **time to create new campaigns reduced by 75%**. 7 months of work completed in 7 weeks.



**Resolves 90% of customer inquiries** without human intervention, so contact center agents could focus on complex cases. They had a **94% customer satisfaction rate**.

1

## Intelligent Control

AI on your terms

2

## Custom Functionality

Define agent behavior

3

## Multimodal Experiences

Engage users everywhere

4

## Secure Scalability

Remain in control

1

## Intelligent Control

AI on your terms

Agents operate in dynamic environments, and without clear oversight and governance, they may become misaligned with business rules and compliance.



Ensure your agents follow your rules for logic and model use with smart, customizable AI controls.

2

## Custom Functionality

Define agent behavior

Agents often face functionality limits due to siloed systems, requiring manual integration that slows development.



Create efficient, intelligent workflows by connecting your agent to your enterprise data, applications and tools – all in one place.

3

## Multimodal Experiences

Engage users everywhere

Organizations often need to engage users across several different channels which can lead to increased development costs.



Build once and deploy across all your platforms with multimodal agents that deliver consistent, intuitive interactions.

4

## Secure Scalability

Remain in control

Scaling agents across your business can lead to risks around governance, performance, and policy enforcement.



Ensure your agent operates within your organization's standards with centralized monitoring and management.

# Intelligent Control

## AI on your terms

Ensure your agents follow your rules for logic and model use with smart, customizable AI controls.

Maximize your agent's **performance** for every task and business goal.

---

Have **complete control** over critical scenarios like HR or legal questions.

---

Enable your agents to **independently think and complete tasks** for you.

Models

Orchestration

1

# Orchestration

An orchestrator **recognizes intent, routes to the correct agent,** and keeps everything organized.

Makers provide **instructions and human guard rails,** adapting them as needed.

Use **autonomous triggers** so your agent can independently begin work and dynamically reason over its capabilities without human intervention.

Easily **mix and manage** both generative orchestration and agent flows (i.e.. more traditional automation) in one system.



# Models

Choose from the **latest AI models** to match your needs, giving you precision and control across knowledge, tools, and prompts for superior results.

## Orchestrate your agents and summarize answers

- Best-in-class models curation for specific scenarios
- Near-instant availability to new models
- No change management for new model releases
- No need for management your own GPU infra
- Ensure responsible AI controls apply by default

## Power your agent's tools

Easy one-click access and use of the 1,900+ models from Foundry including Llama, Mistral, Cohere etc. to handle task and scenario specific needs

Claude Sonnet 4.5 (external, preview) ▼

OpenAI models

**GPT-4o** Default  
Great for most tasks

**GPT-4.1** Preview  
Great for most tasks and quick analysis

**GPT-5 Chat** Experimental  
Great for most tasks

**GPT-5 Auto** Experimental  
Automatically switches between chat and reasoning

**GPT-5 Reasoning** Experimental  
Maximum depth and accuracy for the most demanding tasks

Anthropic models ⓘ

✓ **Claude Sonnet 4.5** External Preview  
Great for most tasks

**Claude Opus 4.1** External Preview  
Perform deep reasoning and structured problem solving

# Custom functionality

## Define agent behavior

Create efficient, intelligent workflows by connecting your agent to your enterprise data, applications and tools - all in one place.

**Multiply capacity** by connecting your agents so they can collaborate on tasks.

---

Unlock the full value of your **company's knowledge**, data and systems.

---

Free up time and resources by **automating business processes** at scale.

Knowledge

Tools

Agents

2

# Knowledge

Add your **public and enterprise data sources** using connectors.

Leverage rich structured and unstructured enterprise data to **inform agent responses and actions**


Your agent will be able to **dynamically generate multi-turn answers** in real time using your enterprise data, so you have a useful agent immediately.

Supported data sources include:

Public websites	SharePoint / OneDrive
Dataverse (for LOB apps like Salesforce, ServiceNow etc.)	Microsoft Fabric
File uploads	Microsoft Graph / Power Platform connectors
Open web search	Azure services (AI Search, SQL)

### Add knowledge


Help your agent provide more relevant information and insights. [Learn more](#)





Upload file


Drag and drop or [select to browse](#). Files can be up to 512 MB, and can't be labeled Confidential or Highly Confidential or contain passwords.


☆ Featured   **Advanced**   [See recommendations](#)


 Microsoft Fabric


 Confluence


 Oracle SQL database


 SAP OData

 Snowflake

 Zendesk

 GitHub  
Microsoft Graph only

 Jira  
Microsoft Graph only

 Stack Overflow  
Microsoft Graph only

[Explore more](#)

Cancel

# Copilot Studio agents can access a broad range of knowledge sources

## Microsoft 365

SharePoint

Exchange

Teams

People

Viva

M365 Graph & connectors

## Dataverse

File uploads

Dataverse tables

Dynamics articles

SharePoint via DV

Power Platform connectors

## Azure

Azure AI Search

SQL

Fabric

Databricks

ADLS

## Internet & Uploads

Enterprise websites

Public websites

Un-scoped web

Structured file uploads

Unstructured file uploads

## External Apps & Services

SAP

Salesforce

Oracle

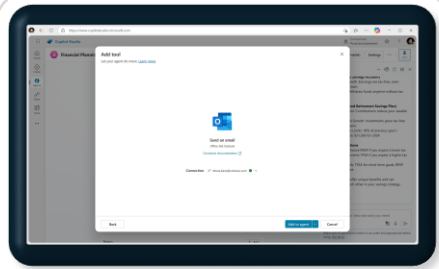
AWS

ServiceNow

& many more

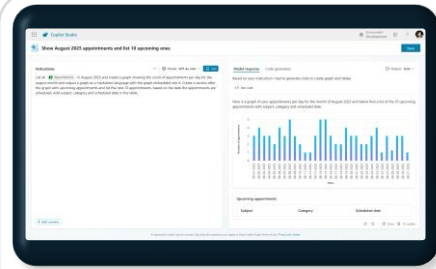
# Tools

Tools are versatile and reusable components.  
Create, manage and use tools across various agents within an environment.



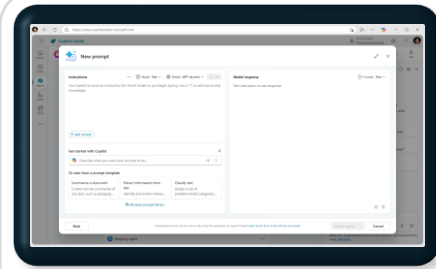
## Connectors

Choose from **1400+** prebuilt Power Platform connectors, **100+ Copilot connectors** or create a **custom connector** for any public API to retrieve information, write/edit/update records to external services and data sources



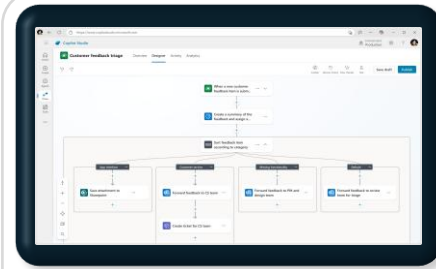
## REST APIs

Use **APIs directly** for your agent to connect with and use data in the most flexible and scalable manner



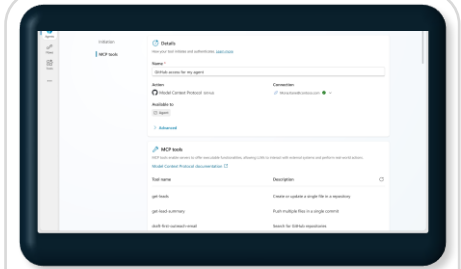
## Prompts

Leverage **library** of prompts or draft **custom instructions** with Copilot to transform text, documents, images and data with LLMs



## Agent Flows

Define **predictable automations** to run the same way each time, giving you more control over specific actions the agent could take, including allowing the agent to directly **use web and desktop apps** through UI automation



## Model Context Protocol

Use open standard protocol to **connect your LOB services** to the agent with adequate context and tools enabled by the servers

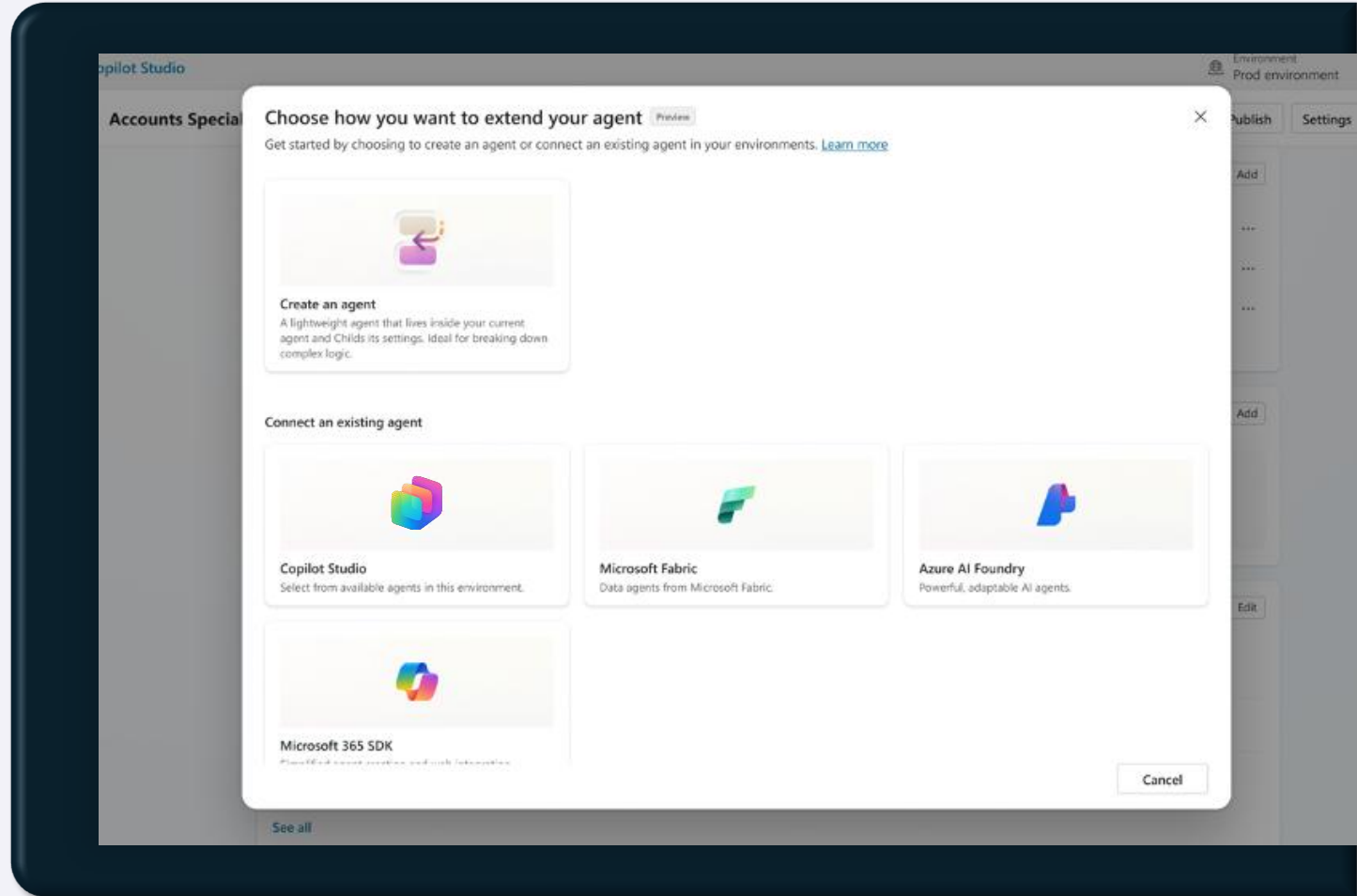
# Multi-agent orchestration

Build multi-agent scenarios by connecting to agents from other services using Copilot Studio

**Effective end-to-end transformation:** Enable agents to talk to each other in Copilot Studio, exchanging data, collaborating on tasks, and distributing work

**Cross-platform orchestration:** Connect your agents with other agents in your tenant, whether they were built using Copilot Studio, Foundry Agents, M365 Copilot SDK or Fabric

**Agent specialization:** An agent can call on connected agents where specialized knowledge or actions are required and complete tasks in minutes



# Multimodal experiences

Engage users everywhere

Build once and deploy across all your platforms with multimodal agents that deliver consistent, intuitive interactions.

Reach your audience across **multiple internal and external channels**.

**Personalize Microsoft 365 Copilot** with new skills and advanced capabilities.

Enhance your **line of business apps** with a modern conversational experience.

Channels

Voice

Hand-off

3

# Channels

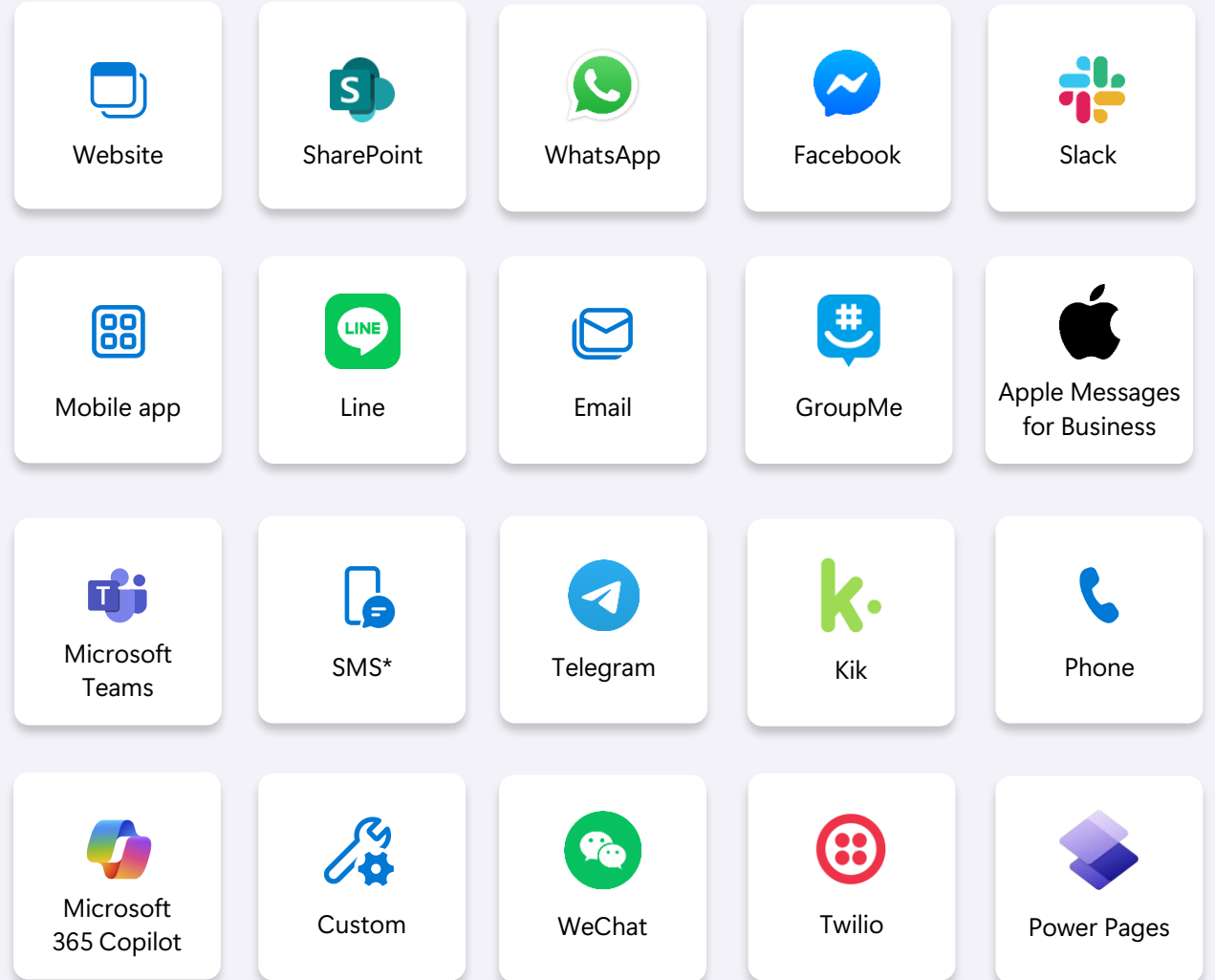
Easily distribute your agent across **multiple channels** with a single click.

---

Deploy agents directly to the applications **your employees frequently work in**, such as Microsoft Teams, SharePoint, and Microsoft 365 Copilot Chat.

---

Get access to **even more channels** beyond what's natively available in Copilot Studio by leveraging Azure Bot Service, Microsoft 365 Agents SDK, Agents Client SDK and Dynamics 365.



# Hand off the conversation to a live agent

Integrate intelligent agents with your existing CRM solutions

Connect to your contact center so your agent can escalate and hand off the conversation with full context to a human agent.

---

Configure agents that can interact with your customers via voice or chat.

---

Selectively route incoming requests to live agents based on context, complexity, and customer.

---

Deliver exceptional customer experiences, unlock service team productivity, and cut costs with autonomous service.



Dynamics 365  
Contact Center



LivePerson



Genesys



Salesforce



ServiceNow



Custom  
engagement hub

# Voice agents

Create a voice-enabled agent to interact with customers over the phone

Add flexibility to your Interactive Voice Response (IVR) systems and voice agents using generative AI to help more users and customers – faster.

Get started in minutes with the voice agent template that comes pre-constructed with voice-specific features.


  
Silence  
detection

  
DTMF  
authoring

  
Barge-in

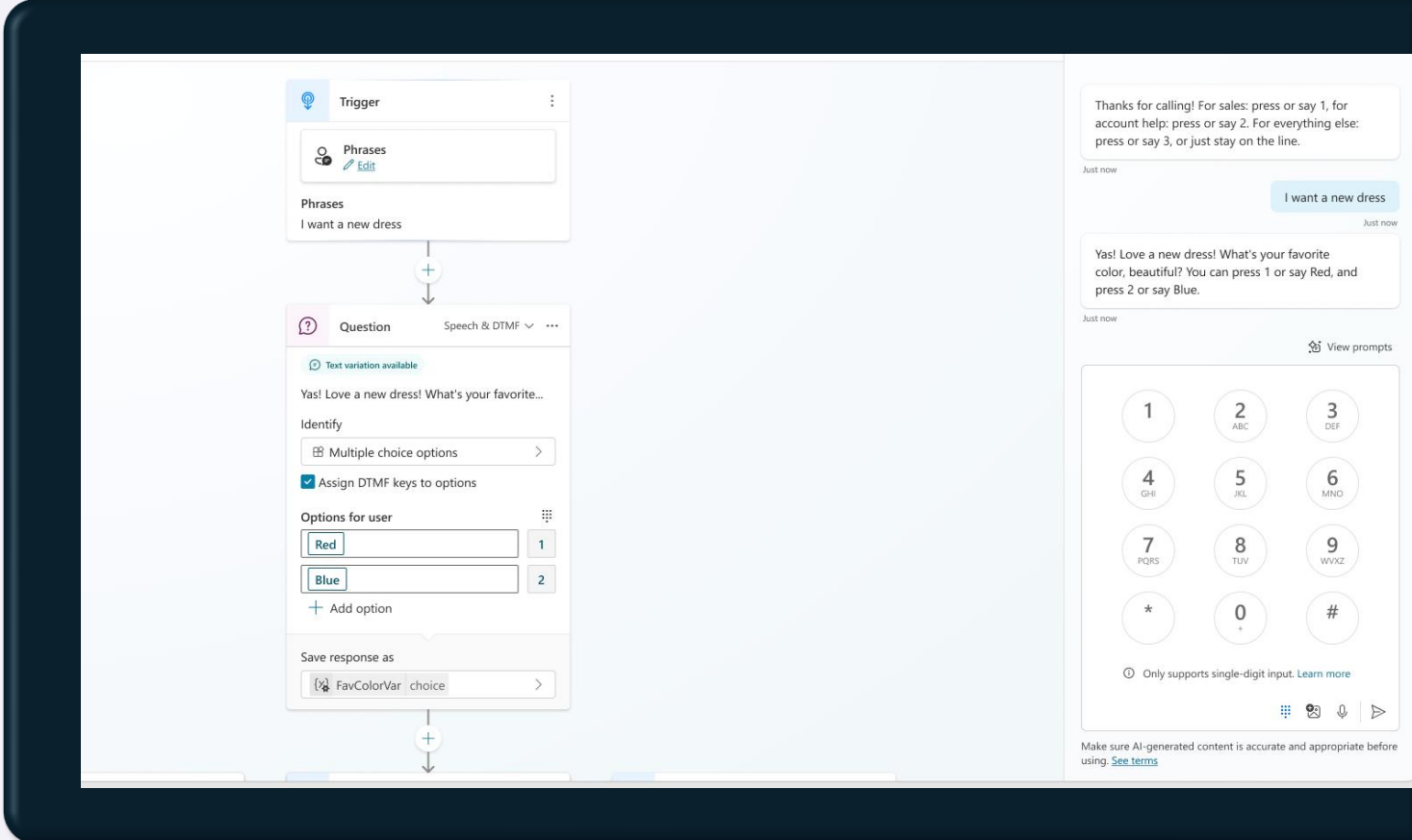
  
Enhanced  
speech  
recognition

  
SSML

  
Noise filter

  
Latency  
message

  
Dialog  
experiences



The screenshot displays a configuration interface for a voice agent. On the left, a flowchart shows a 'Trigger' step leading to a 'Question' step. The 'Trigger' step has a 'Phrases' field containing 'I want a new dress'. The 'Question' step is titled 'Question' and includes a 'Text variation available' toggle, a question prompt 'Yas! Love a new dress! What's your favorite...', an 'Identify' section with 'Multiple choice options' and 'Assign DTMF keys to options' checked, and a list of options for user input: 'Red' (key 1) and 'Blue' (key 2). Below the options is a 'Save response as' field containing 'FavColorVar choice'.

On the right, a simulated customer interaction is shown. The first message is: 'Thanks for calling! For sales: press or say 1, for account help: press or say 2. For everything else: press or say 3, or just stay on the line.' A button labeled 'I want a new dress' is shown. The second message is: 'Yas! Love a new dress! What's your favorite color, beautiful? You can press 1 or say Red, and press 2 or say Blue.' Below this is a numeric keypad with buttons for digits 1-9, \*, 0, and #. A note at the bottom states: 'Only supports single-digit input. Learn more'.

# Secure scalability

## Remain in control

Ensure your agent operates within your organization's standards with centralized monitoring and management.

Achieve **faster ROI** by continually improving your agent's performance.

---

Safeguard **customer trust** with enterprise-grade governance controls.

---

**Reduce risks** while empowering makers across your org to build their own agents.

Governance

Management

Reporting

4

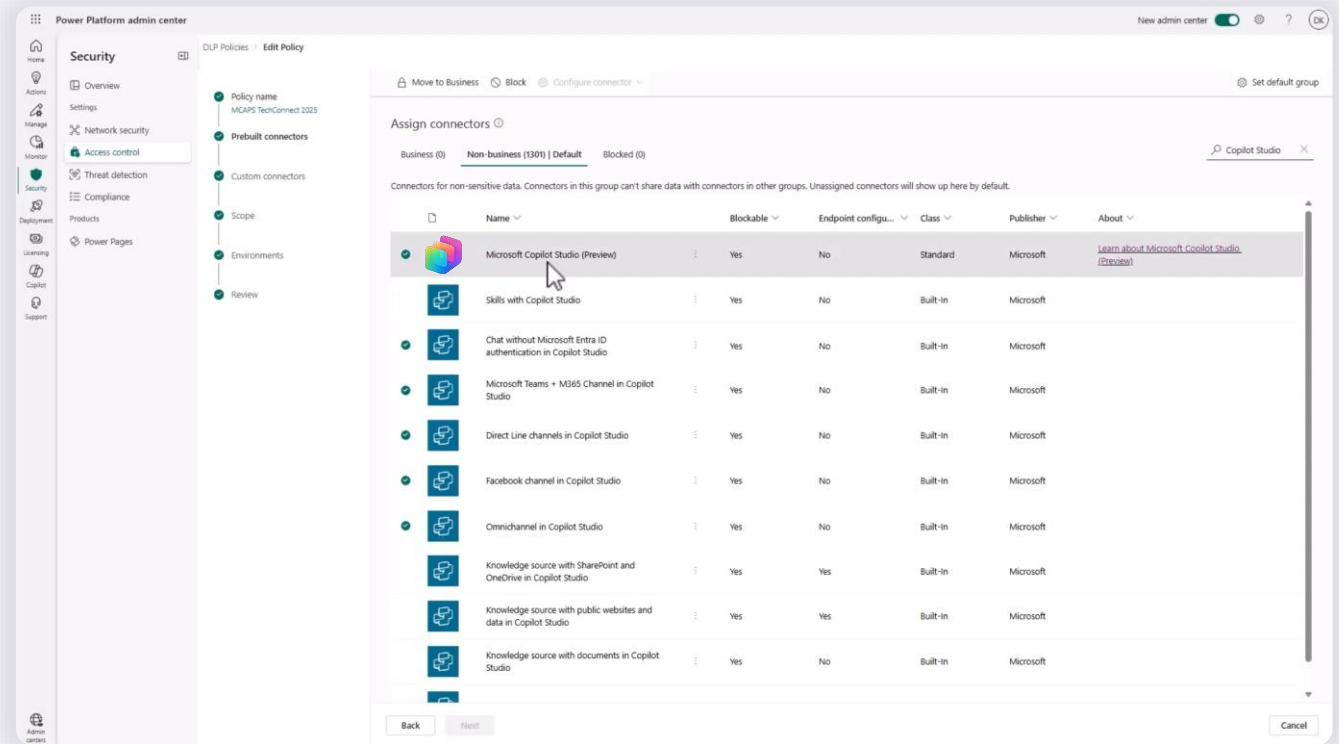
# Security & Governance

Prepare your environment to implement secure Copilot Studio adoption.

Identify risks related to data, users, and agents to prevent sensitive data leakage and ensure agents do not process sensitive files.

Prevent data loss and insider risks by securing sensitive files, agent interactions, and providing alerts and reports on risky behavior and AI usage.

Govern AI use to meet regulations and policies by inspecting interaction content and audit logs, investigating for compliance and ethical violations, and enforcing lifecycle policies and legal holds.

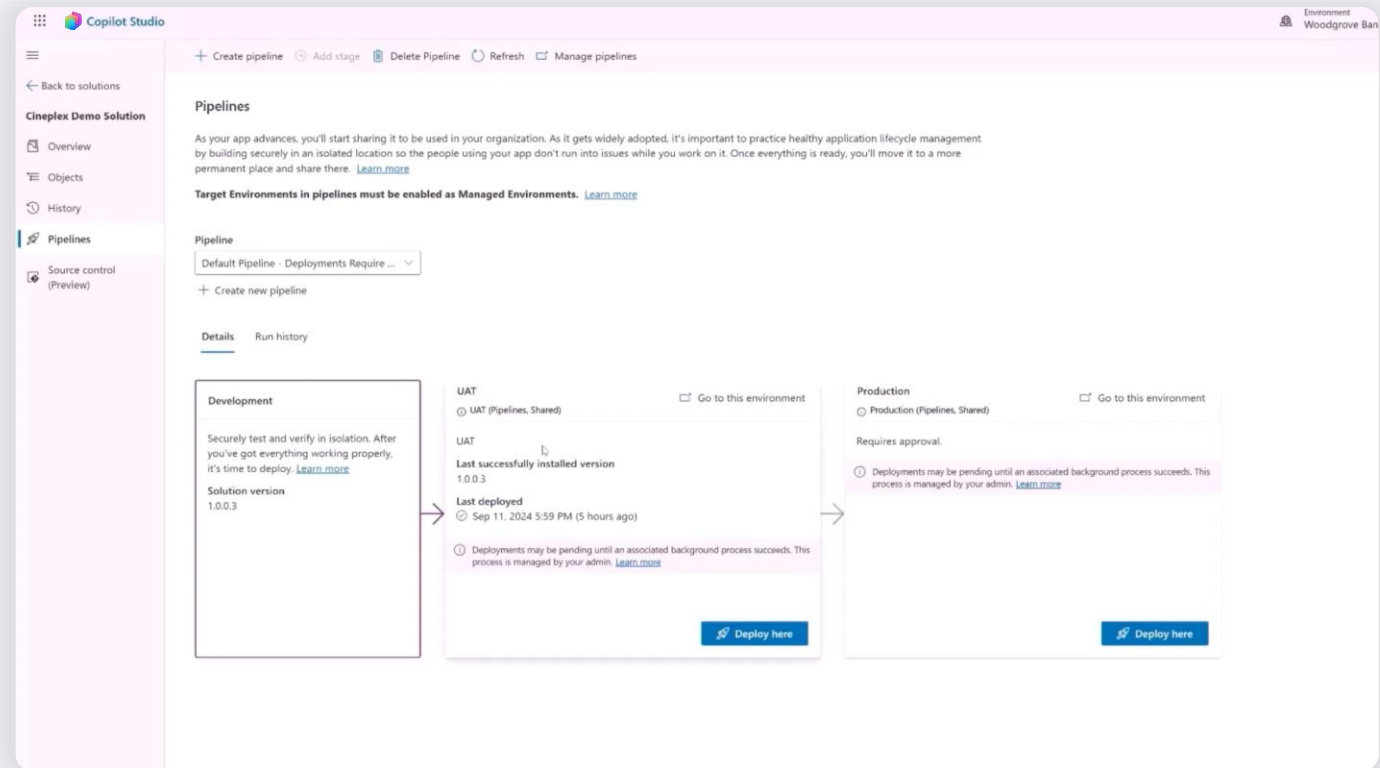


# Management Controls

Manage dedicated development environments, employ agent **lifecycle management controls**, and oversee **agent spend** in the Power Platform admin center.

Establish clear guidelines and policies for agent behavior to **ensure consistency and compliance** across all interactions.

Implement agent policies to **restrict oversharing of agents** and manage publishing channels.



# Measurement & Reporting

Track readiness and adoption of agents, audit agent actions and usage, and track agent ROI.

Review agent performance metrics in real-time like usage, engagement, success rates, and satisfaction in the built-in Analytics dashboard.

Analyze data collected from agent interactions to identify trends, areas for improvement, and opportunities for training and development.

Share reports with relevant stakeholders to facilitate informed decision-making.

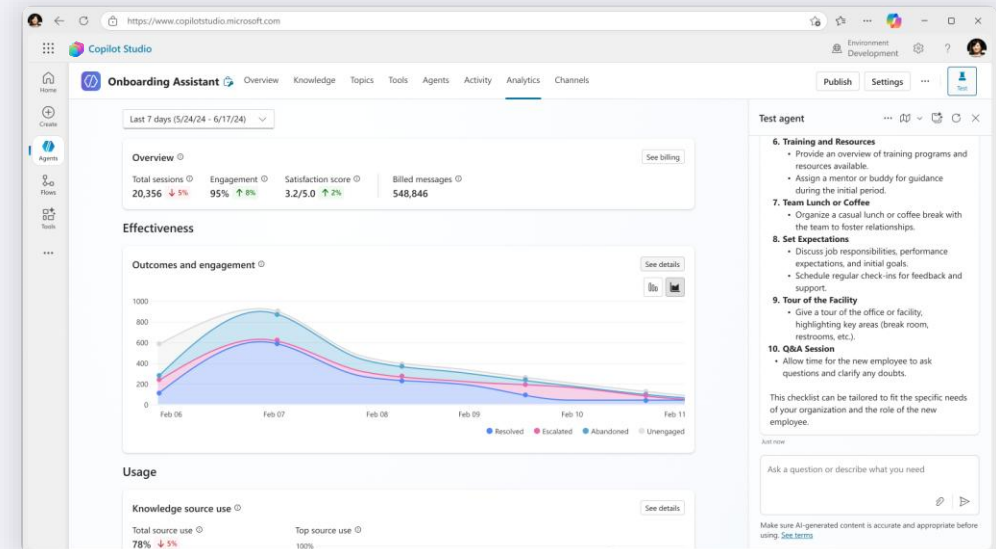
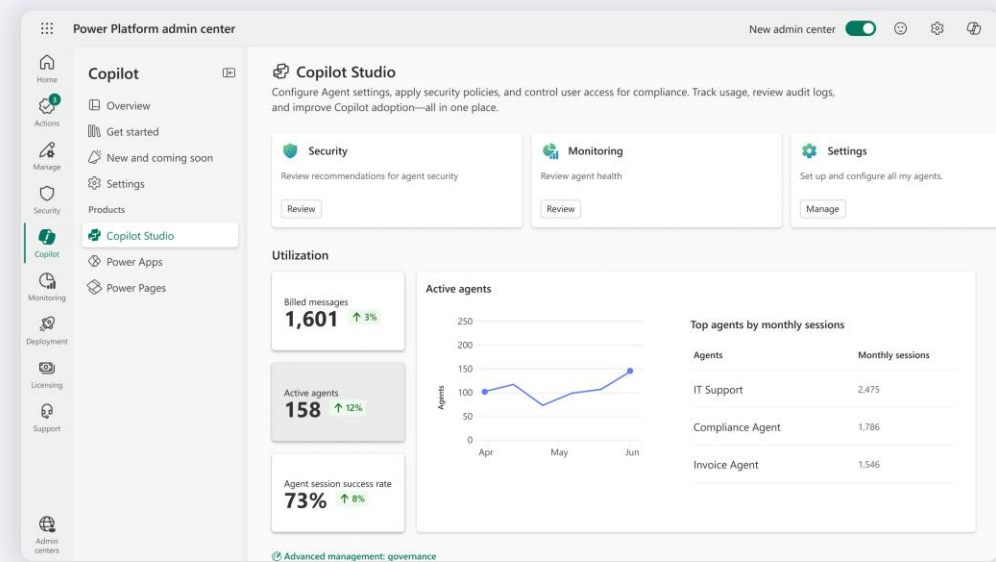
Copilot Studio

Azure Application Insights

Viva Insights

Power Platform Admin Center

Microsoft Purview



# Agent Evaluation

**Automated testing:** Makers can validate agent performance before and after deployment without manual, ad hoc testing.

## Flexible, Scalable Evaluation Methods:

- Create evaluation sets using manual questions, imported files, or even AI-generated queries
- Choose from multiple test methods (exact match, semantic similarity, intent recognition etc.) to assess agent quality
- Review agent accuracy & reliability with pass/fail indicators, detailed scores, and insights into how knowledge sources are used.

## Continuous Improvement & Risk Reduction:

Identify issues early, reduce risk, and maintain quality as agents evolve throughout their lifecycle

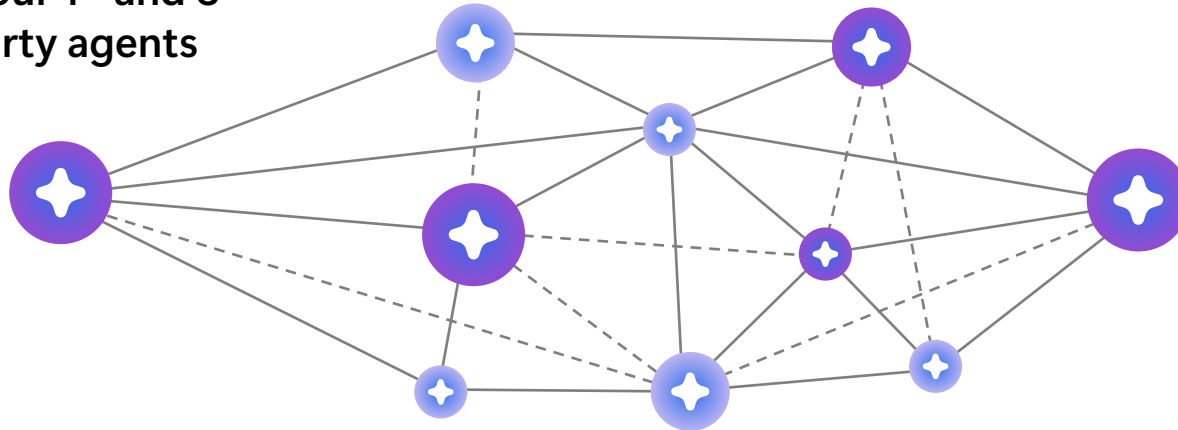
The screenshot displays the Copilot Studio interface for the 'Contoso travel agent'. The 'Analytics' section is active, showing a table of test cases under the heading 'Review your test cases (32)'. The table has columns for 'Question', 'Test method', and 'Expected response'. One test case is selected: 'What if there is an emergency?' with a 'Compare meaning' test method. A modal window titled 'Edit test case' is open, showing the question 'What if there is an emergency?' and the 'Expected response' which is 'In an emergency, remain calm, listen for announcements, and follow crew directions. Head to the nearest safe area or lifeboat station as instructed, and assist others if needed.' The modal also shows a 'Passing score: 70/100' with a progress bar and a 'Test method' section with options for 'Quality', 'Similarity', and 'Text match'. The 'Compare meaning' method is selected, with a description: 'Answers have the same meaning as the expected response, even if they are worded differently.'

Question	Test method	Expected response
What does travel insurance cover?	Text similarity	Travel insurance protects travelers from unexpected costs,...
Do you offer any discounts for kids?	Exact match	Yes, Contoso offers a Kids Cruise Free promotion.
Do you offer gifts & indulgences?	Exact match	Every guest gets a welcome basket!
What childcare & youth programs are available?	Exact match	We offer crafts, sports, dance parties, and babysitting.
Does Contoso Line offer accessible shore excursions?	Text similarity	Yes, Contoso Line offers accessible shore excursions. These...
<input checked="" type="checkbox"/> What if there is an emergency?	Compare meaning	In an emergency, remain calm, listen for announcements...
What if I have food allergies?	Text similarity	For food allergies, it's important to inform the staff i...
Are laundry facilities available on board?	Text similarity	Yes, laundry facilities are available on all of our ships...
Can guests under 21 travel alone?	Text similarity	Guests under 21 can travel alone depending on the...

# The IT Control Plane for all your agents

 Agent 365

All your 1<sup>st</sup> and 3<sup>rd</sup>  
party agents



  
Agent  
directory

  
Policy-based  
controls

  
Security &  
Compliance

  
Monitoring  
& Logs

  
M365 Data  
& Comms

# Agent 365

Manage, secure and govern all your agents

**Observability:** Manage agents through a unified inventory and apply shared system primitives for guardrails and role-based reporting.

**Access control:** Use context and risk-based access policies to prevent agent compromise, granting agents only the minimum access needed.

**Data security:** Safeguard sensitive data by preventing oversharing, leaks, and unsafe agent actions.

**Threat protection:** Protect agents by fixing vulnerabilities, detecting and responding to attacks, and blocking harmful traffic.

**Productivity tools:** Provide agents with identical apps and link them to Work IQ for better workflow integration and context.

The screenshot shows the Microsoft 365 Admin Center interface for managing agents. The main content area is titled 'All agents' and provides a summary of the agent inventory. The summary shows 2,650 total agents, 36 blueprints, 3 risky agents, and 5 missing owners. Below the summary, there is a table of agents with columns for Name, Built by, Status, Active users, Security & compliance, and Last updated. The table lists several agents, including Sales Agent, Budget assistant, Expenses Agent, Dropbox, Project coordinator, Health Agent, and Reporting Agent.

Name	Built by	Status	Active users	Security & compliance	Last updated
Sales Agent	Microsoft	Not published	0	—	Aug 31, 2025
Budget assistant	Microsoft	Available to all users	687	Protected	Aug 31, 2025
Expenses Agent	Microsoft	Available to all users	26	Protected	Aug 20, 2025
Dropbox	Dropbox	Available to some users	352	Protected	Aug 20, 2025
Project coordinator	Microsoft	Not published	0	—	—
Health Agent	External	Not published	0	—	—
Reporting Agent	Microsoft	Available to all users	734	Protected	Aug 10, 2025

# Create a high-impact agent in minutes



## Zava Launch Planning Agent

Autonomously assist marketing managers at every stage of a new product launch by leveraging an existing process library and past launch data.



### What it can do

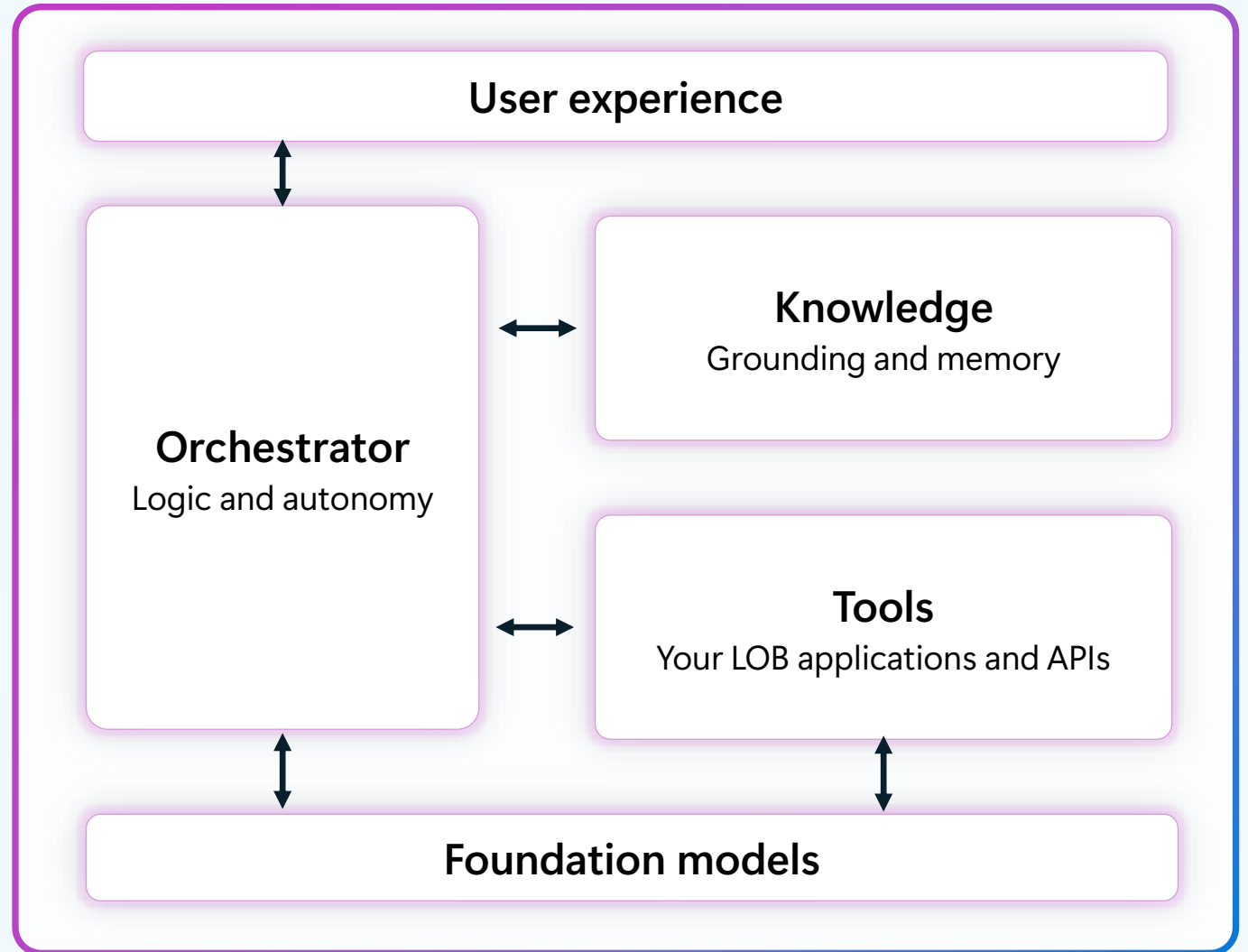
- **Build a comprehensive marketing plan:** Generates a timeline with milestones, task breakdowns and resource assignments tailored to the company's organizational structure.
- **Facilitate collaboration:** Integrates with Planner, SharePoint and Teams to assign tasks, share assets and collect approvals.
- **Estimate budget and resources:** Uses historical benchmarks to produce budget estimates and resource requirements.
- **Track progress and trigger alerts:** Monitors key path tasks and sends proactive reminders for upcoming deadlines or approval gates.



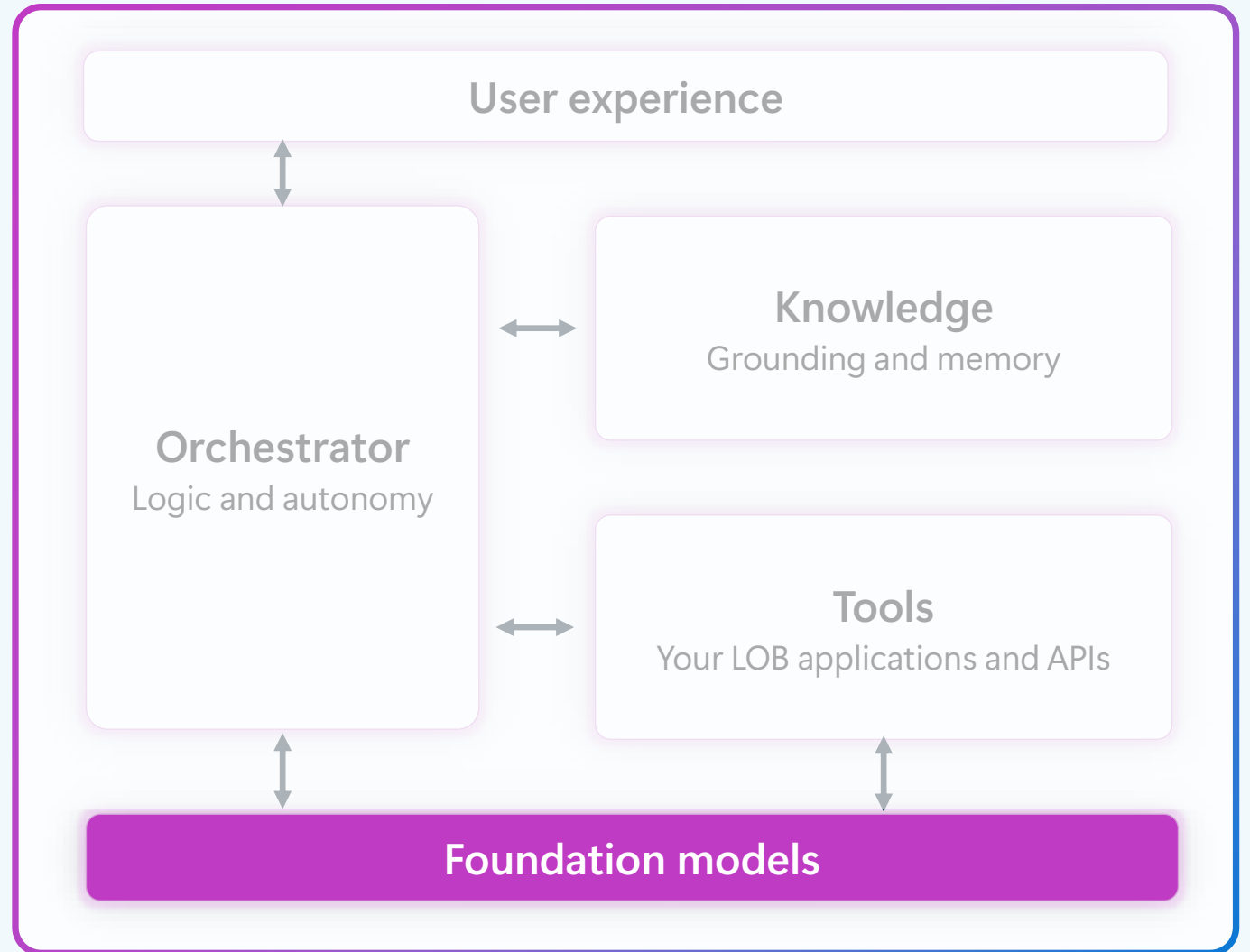
### Business value

- ✓ **Reduce manual effort** by automating key processes
- ✓ Deliver marketing outcomes **in seconds** instead of weeks
- ✓ **Accelerate time to market** for new products
- ✓ Ensure **consistency** with internal standards

# Anatomy of an agent

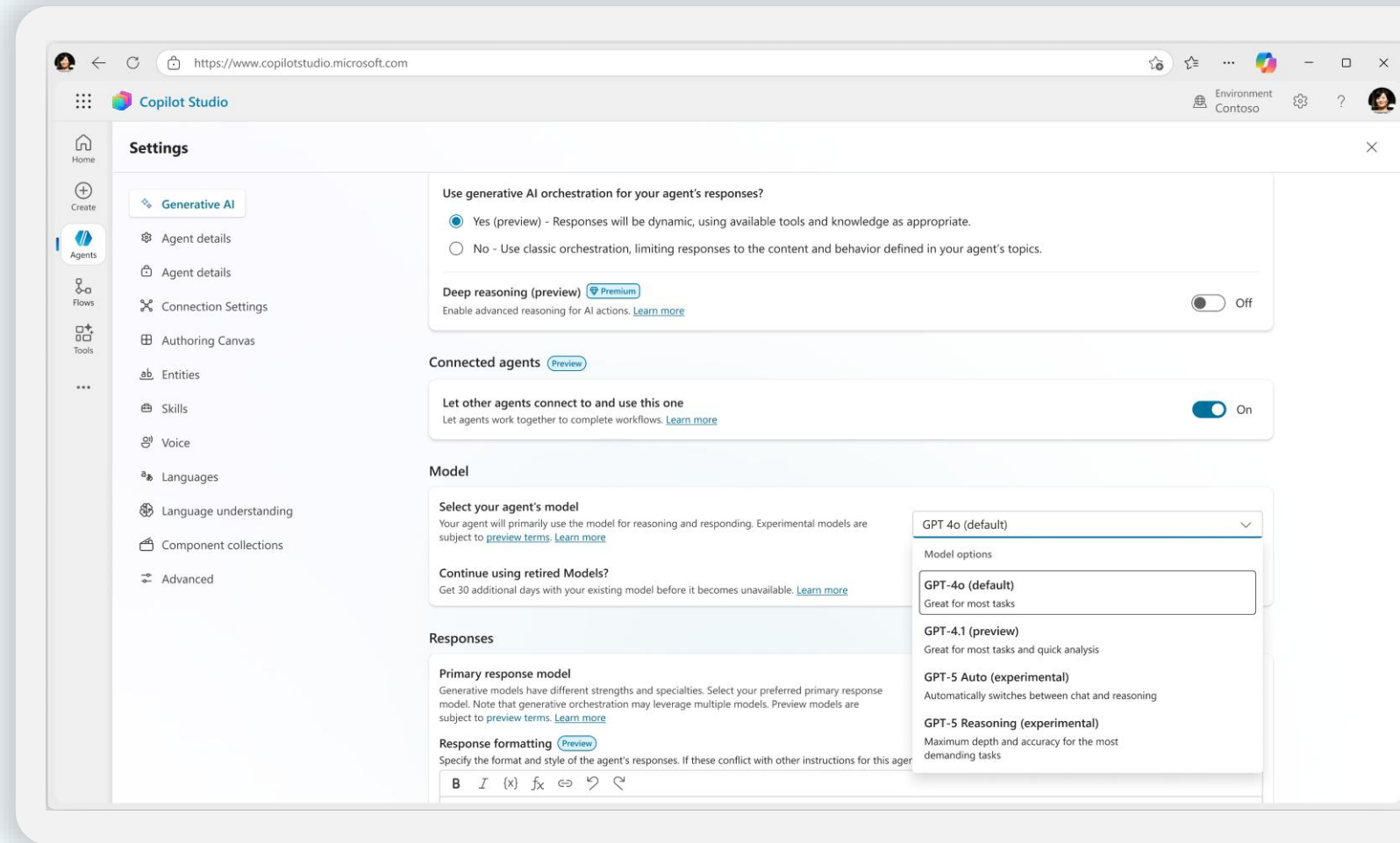


# Models

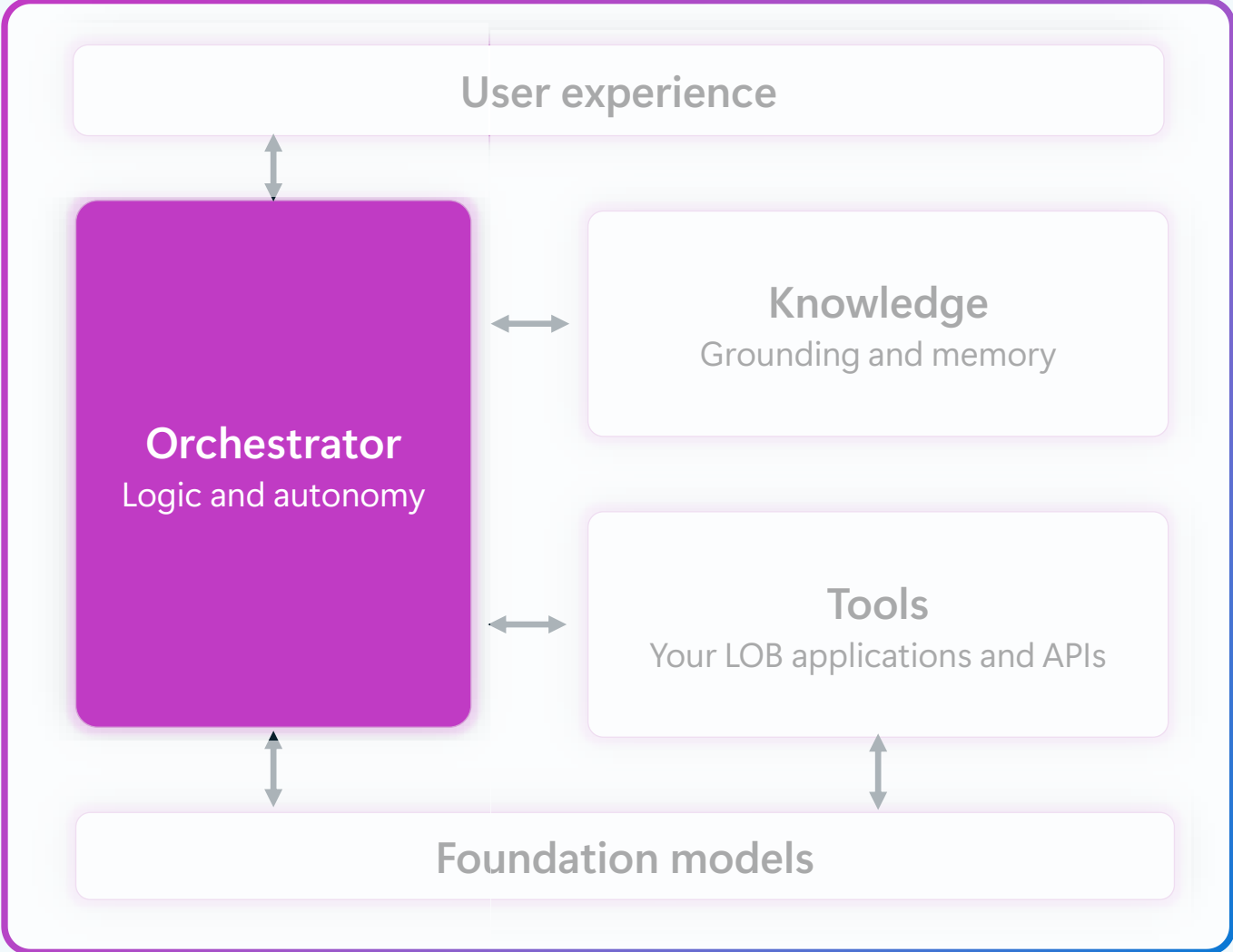


# Choose a model

In the settings page of our agent, we're first going to select "GPT-5 Auto". This will enable our agent to dynamically choose the correct model for the job.



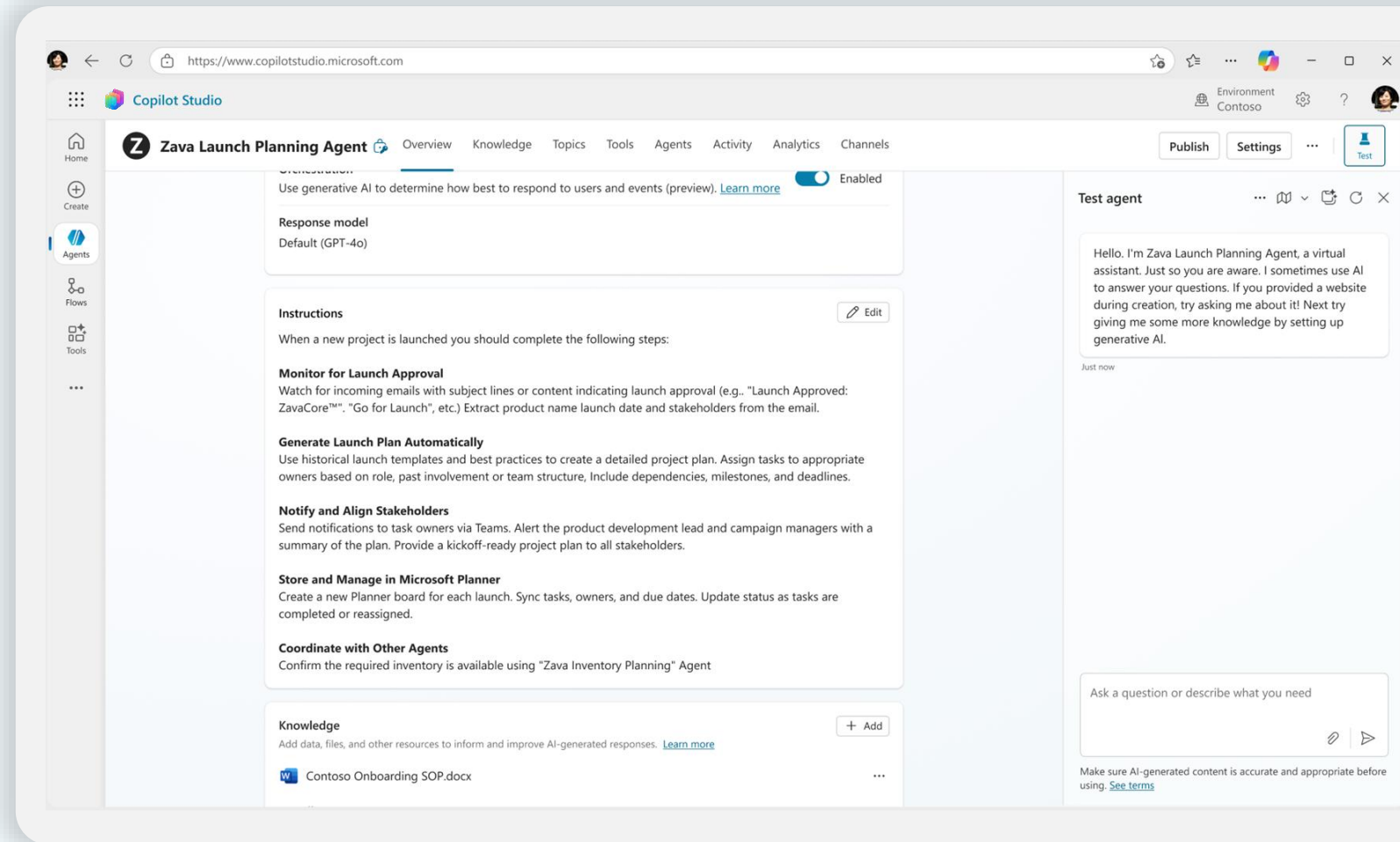
# Orchestration



# Write instructions

Next, we're going to navigate to the agent overview page and write instructions that describe exactly what we want to agent to do in natural language.

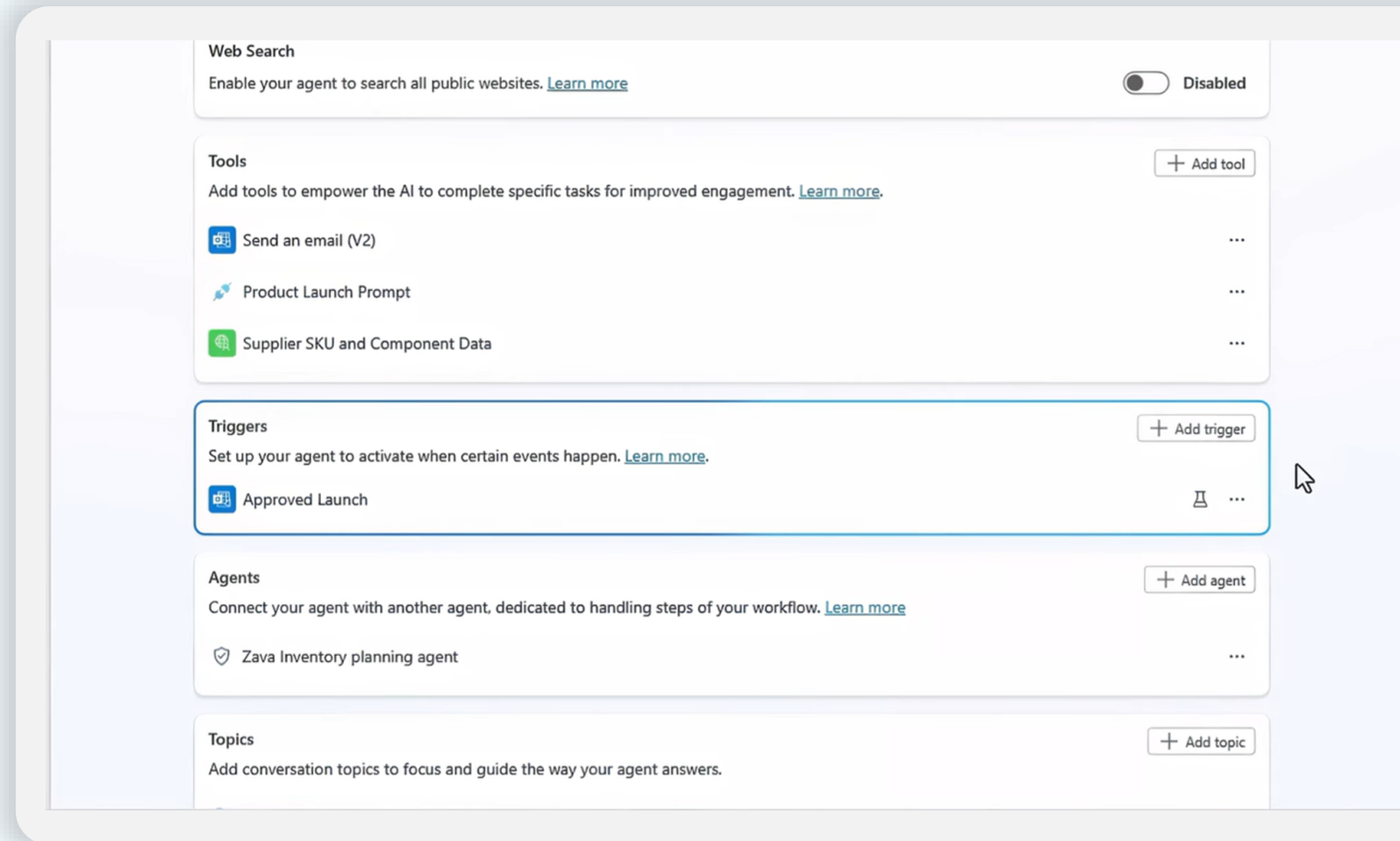
For this scenario, we're directing the agent to monitor our users' email inbox for launch approval, generate a plan, notify task owners, and so on.



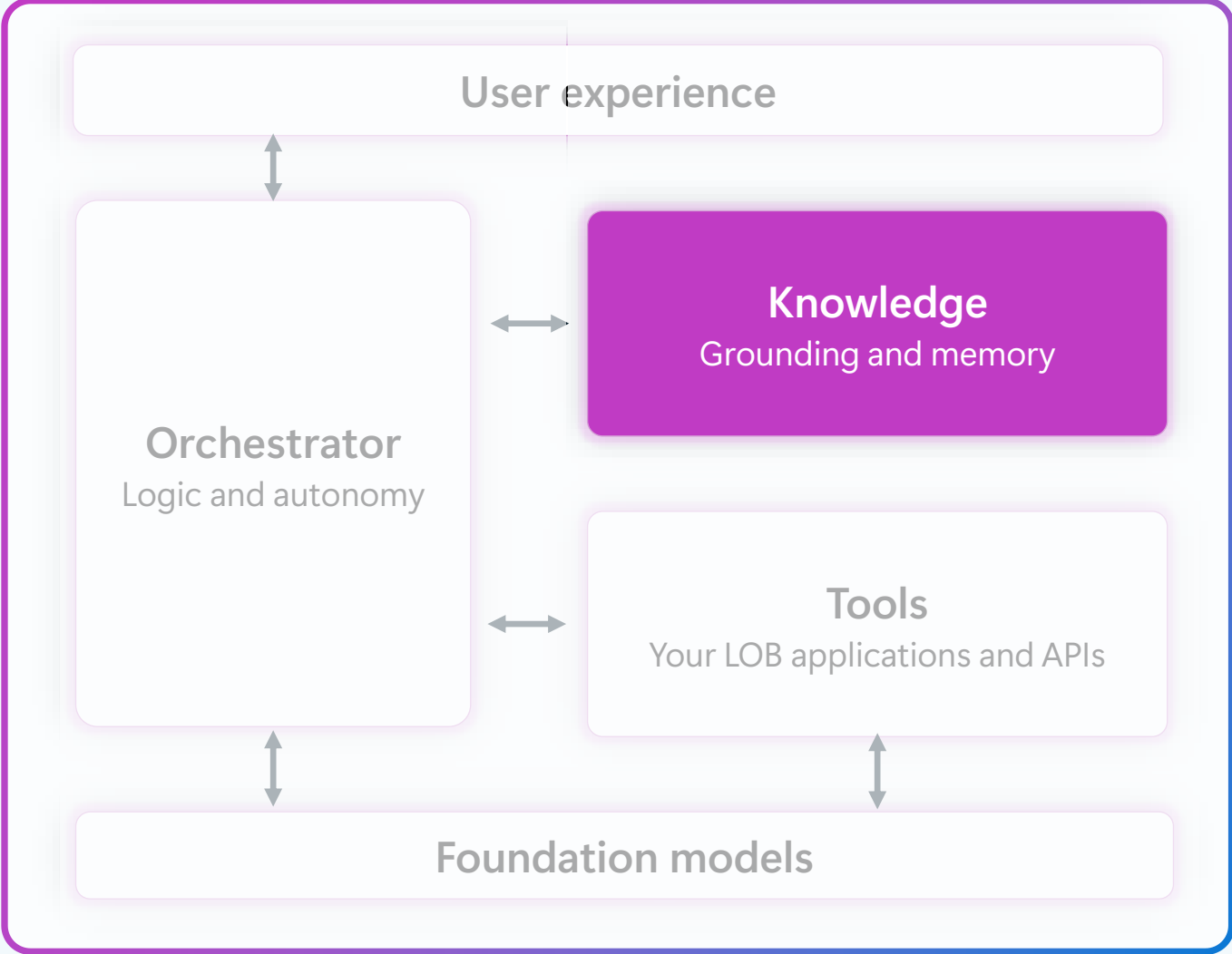
# Add a trigger

Then we'll add a trigger that prompts the agent to autonomously jump into action once our user gets an email approving the product launch.

This frees up our employees for higher value tasks and ensures the launch planning workstreams are initiated promptly and consistently.



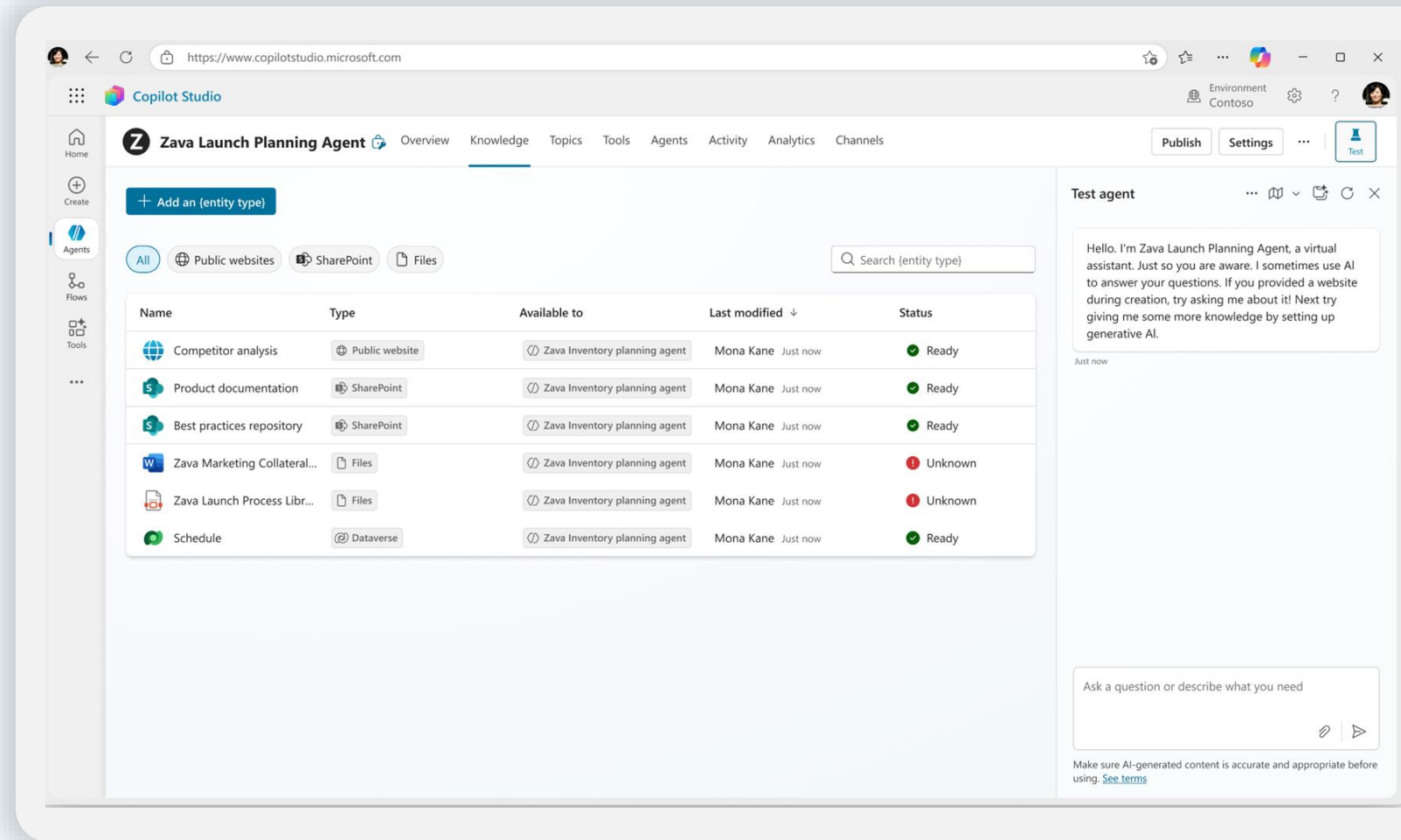
# Knowledge



# Add knowledge sources

In the Knowledge tab, we're going to add a few important knowledge sources the agent will need to get its work done.

This includes the competitive analysis of previous launches, product specs, best practices in SharePoint and more.



The screenshot shows the Copilot Studio interface for the 'Zava Launch Planning Agent'. The 'Knowledge' tab is active, displaying a table of knowledge sources. The table has columns for Name, Type, Available to, Last modified, and Status. The sources include 'Competitor analysis' (Public website), 'Product documentation' (SharePoint), 'Best practices repository' (SharePoint), 'Zava Marketing Collateral...' (Files), 'Zava Launch Process Libr...' (Files), and 'Schedule' (Dataverse). A 'Test agent' chat window is open on the right, showing a greeting from the agent and a text input field for the user.

Name	Type	Available to	Last modified	Status
Competitor analysis	Public website	Zava Inventory planning agent	Mona Kane Just now	Ready
Product documentation	SharePoint	Zava Inventory planning agent	Mona Kane Just now	Ready
Best practices repository	SharePoint	Zava Inventory planning agent	Mona Kane Just now	Ready
Zava Marketing Collateral...	Files	Zava Inventory planning agent	Mona Kane Just now	Unknown
Zava Launch Process Libr...	Files	Zava Inventory planning agent	Mona Kane Just now	Unknown
Schedule	Dataverse	Zava Inventory planning agent	Mona Kane Just now	Ready

Test agent

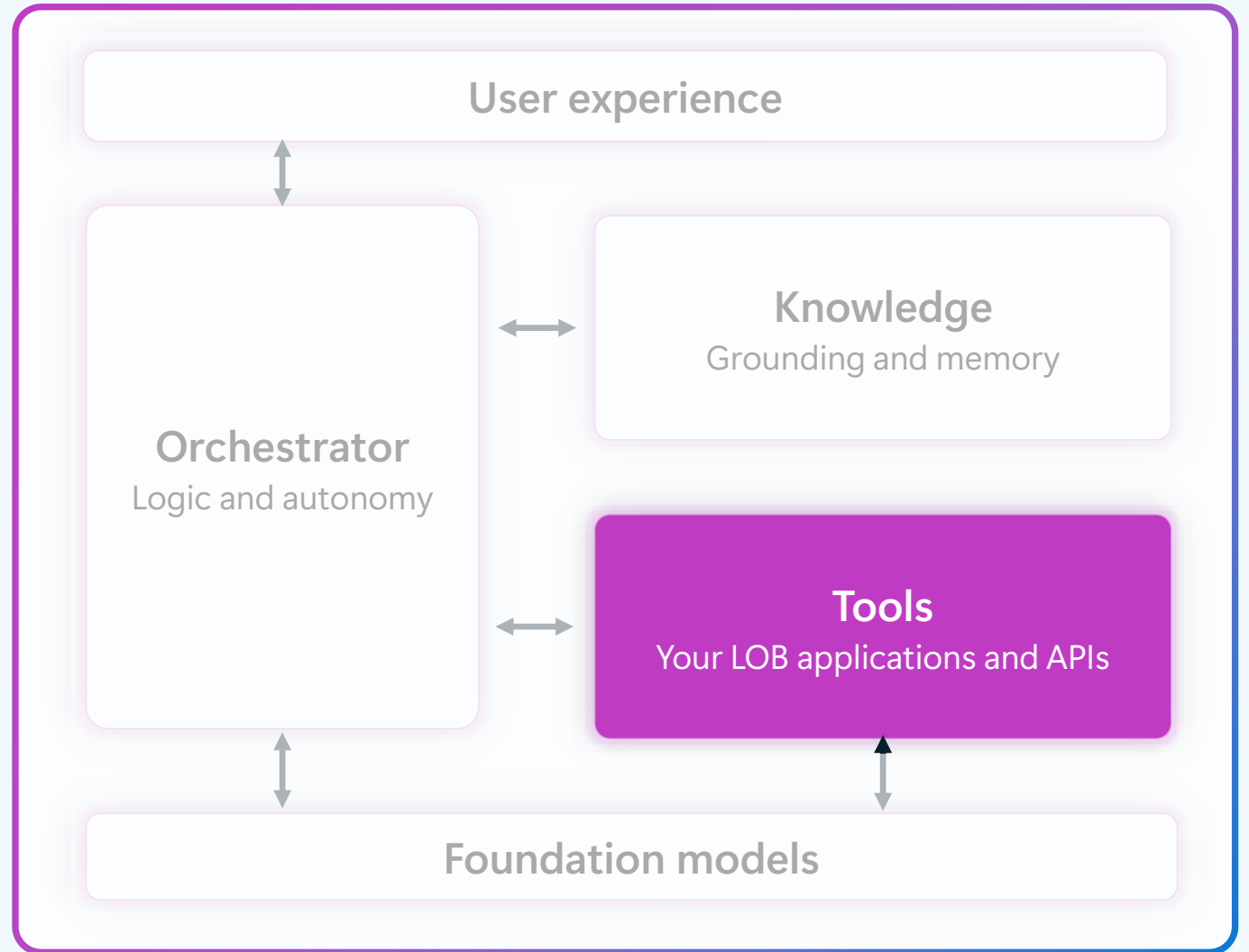
Hello, I'm Zava Launch Planning Agent, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.

Just now

Ask a question or describe what you need

Make sure AI-generated content is accurate and appropriate before using. [See terms](#)

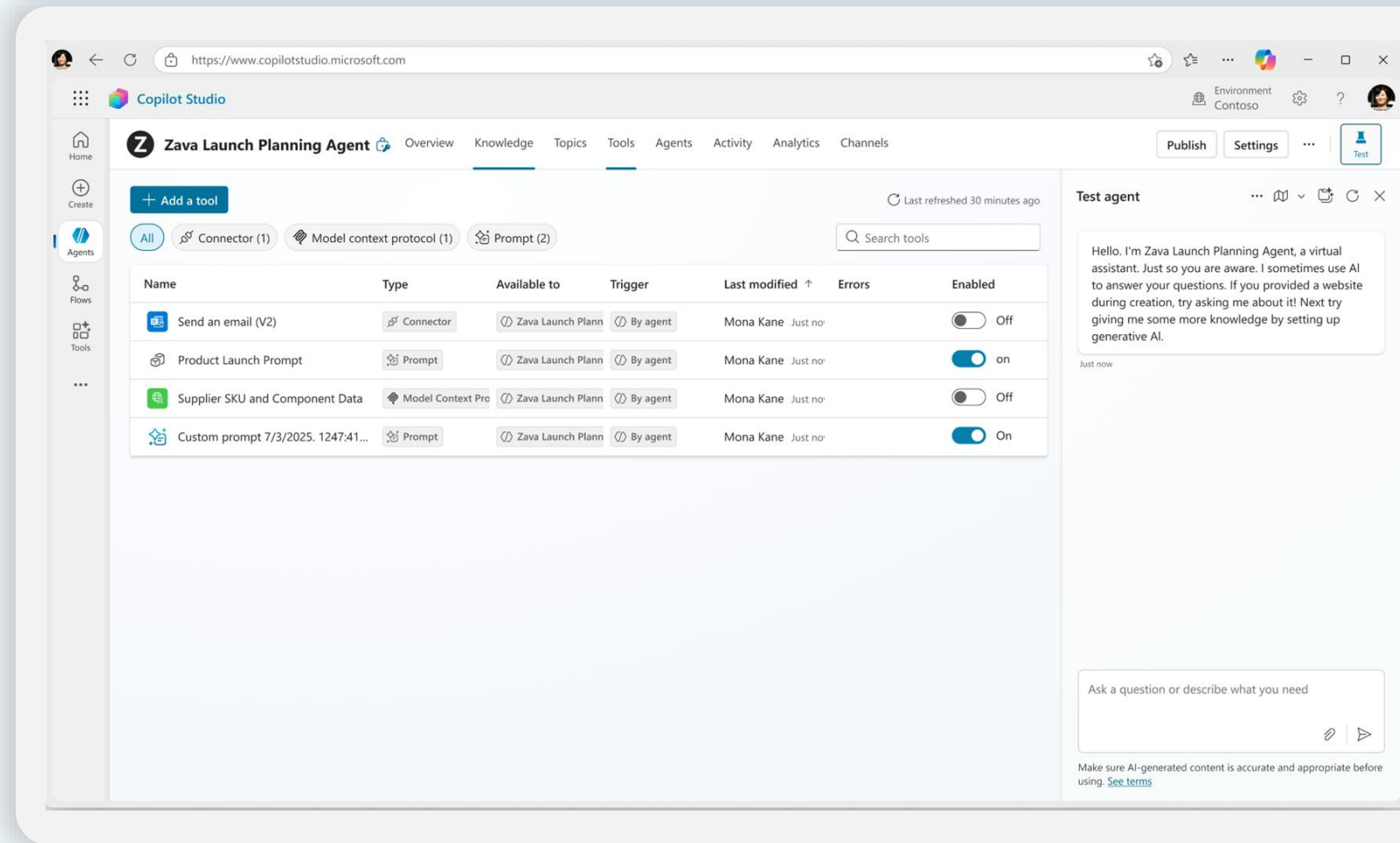
# Tools



# Add tools

In the Tools tab, we can specify the exact actions we want the agent to take, such as creating and assigning tasks.

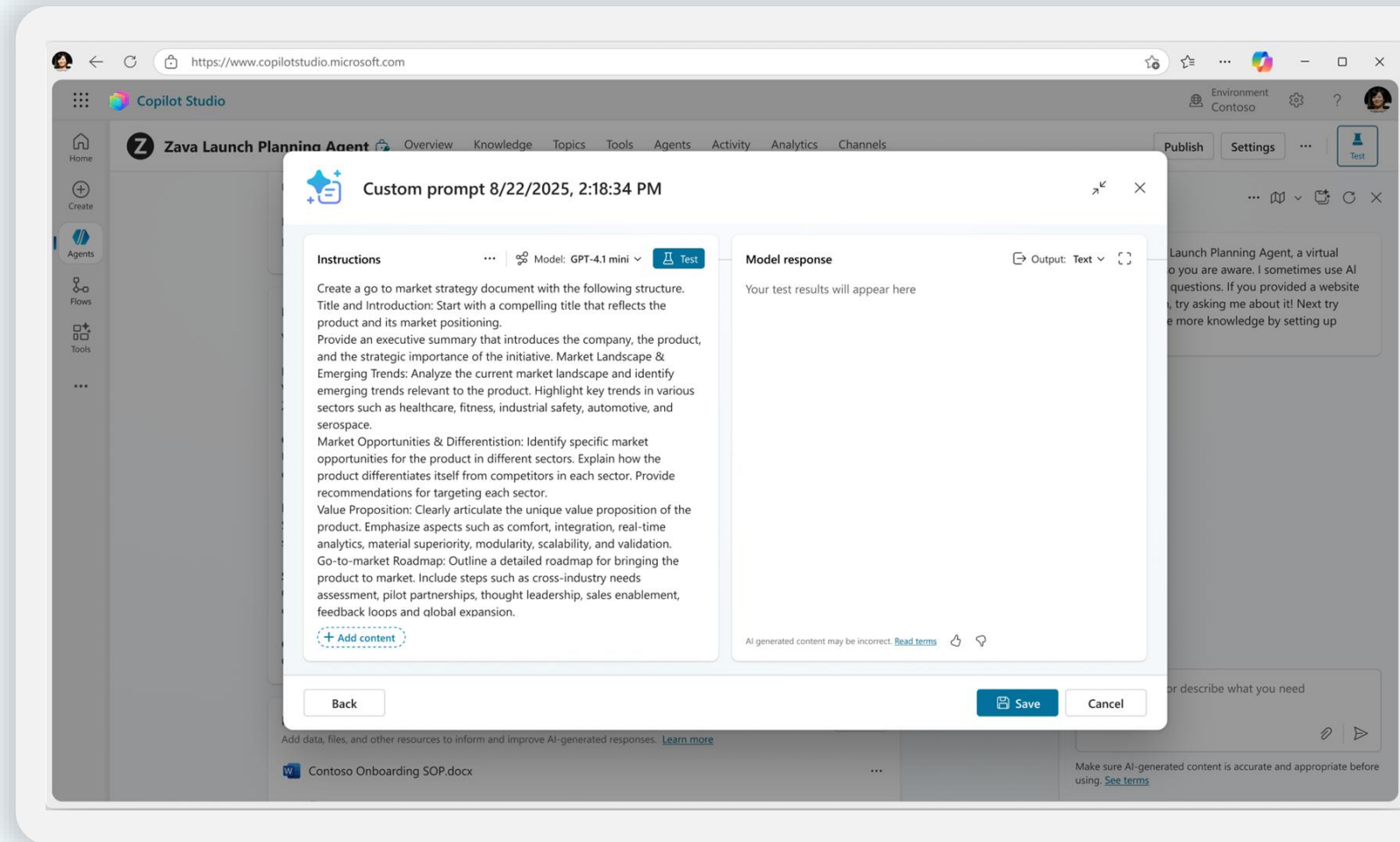
We'll start by adding a custom MCP server to help the agent use dynamic skew and component data, enhancing its ability to access contextual information from other apps without us needing to provide extra explanation.



# Create a custom prompt

Then we'll create a custom prompt that outlines exactly how to structure the marketing strategy document based on our organization's guidelines.

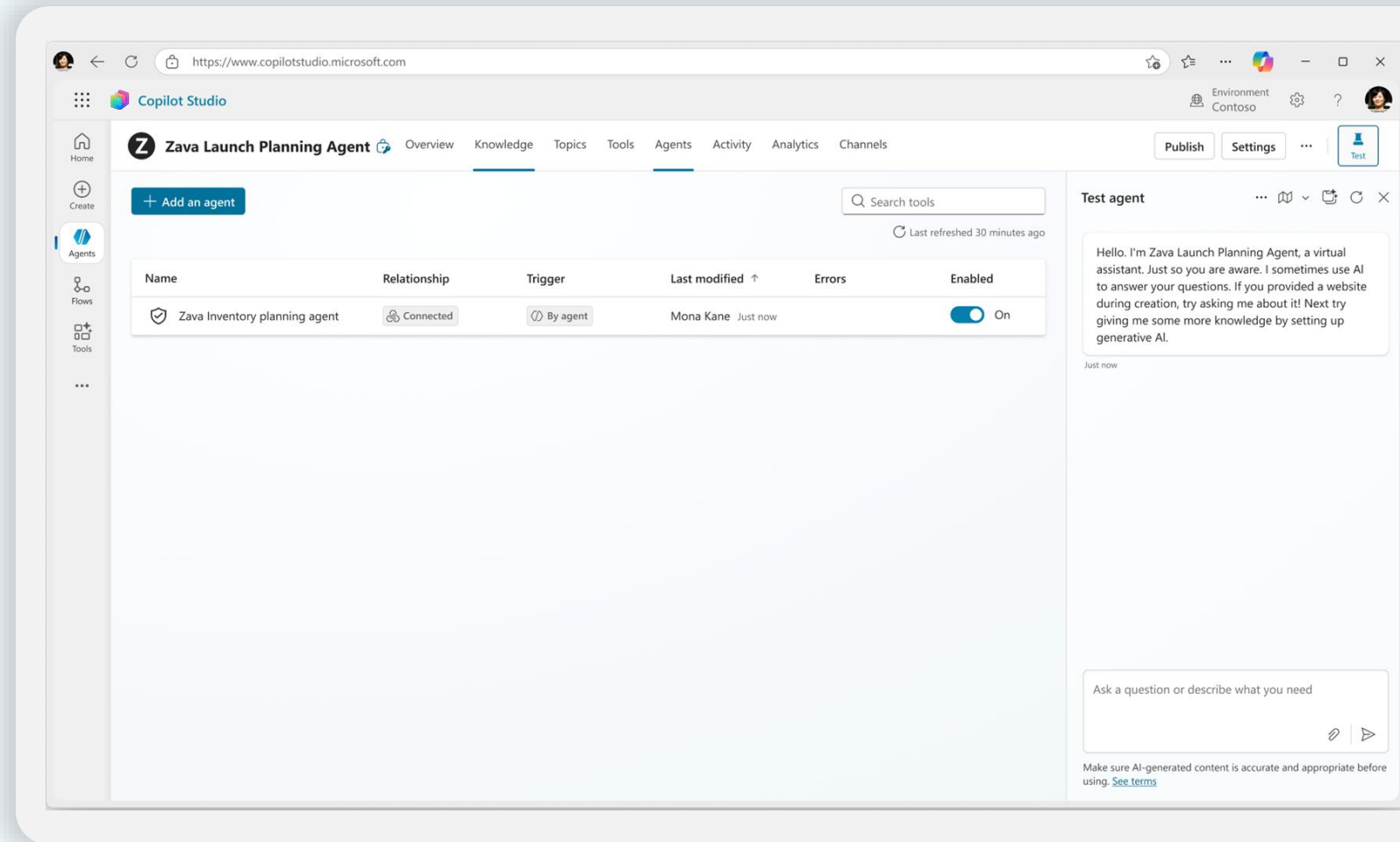
A custom prompt is better for this use case than connecting to an agent like Researcher as it offers flexibility in model choice and more control over structure, format, tone, and costs.



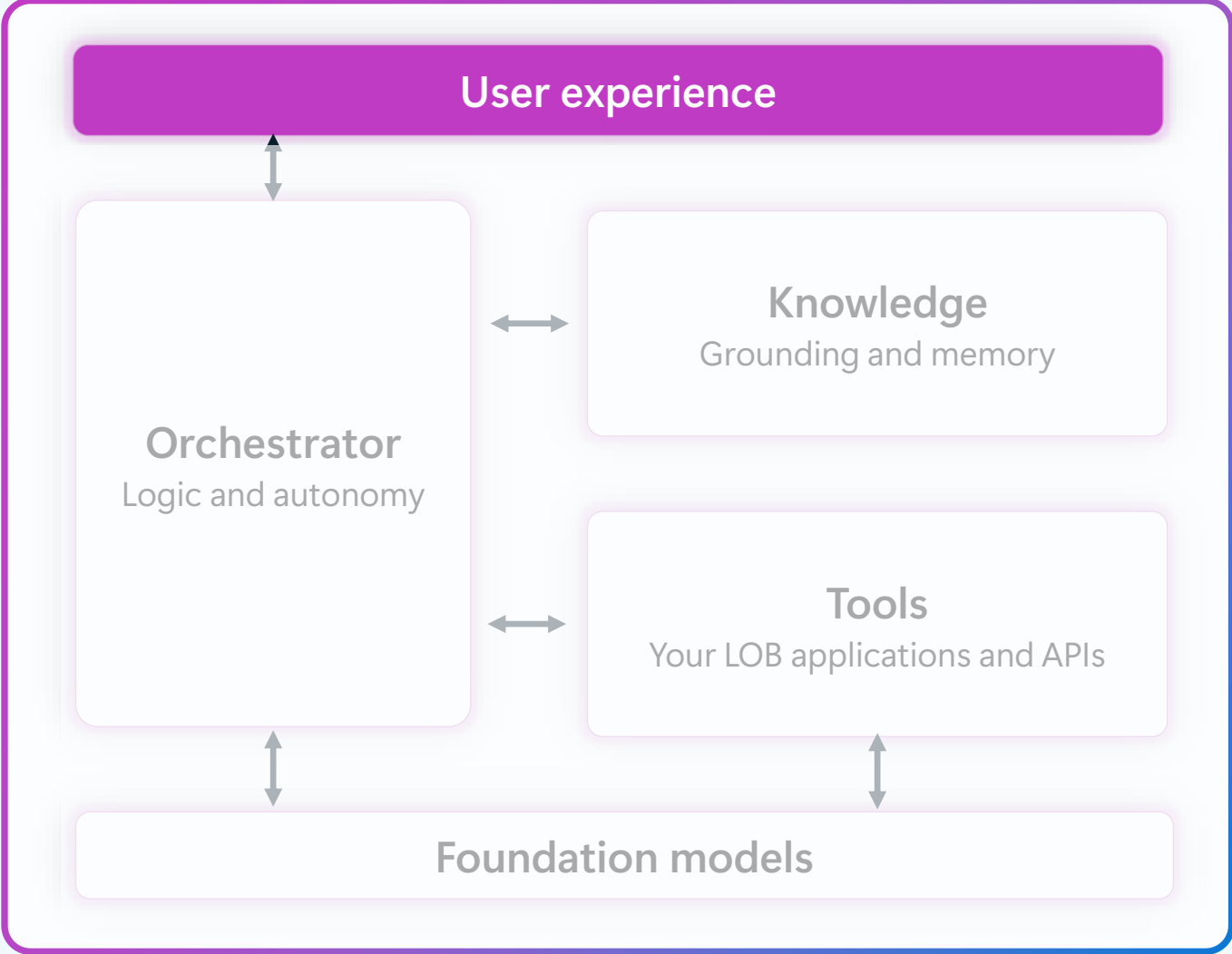
# Connect to other agents

Next, we're going to connect our agent to another one we've already created that can review inventory status and provide accurate estimates for the product launch plan.

By allowing the two agents to collaborate, we'll ensure our agent can most effectively complete its tasks while minimizing development redundancy.

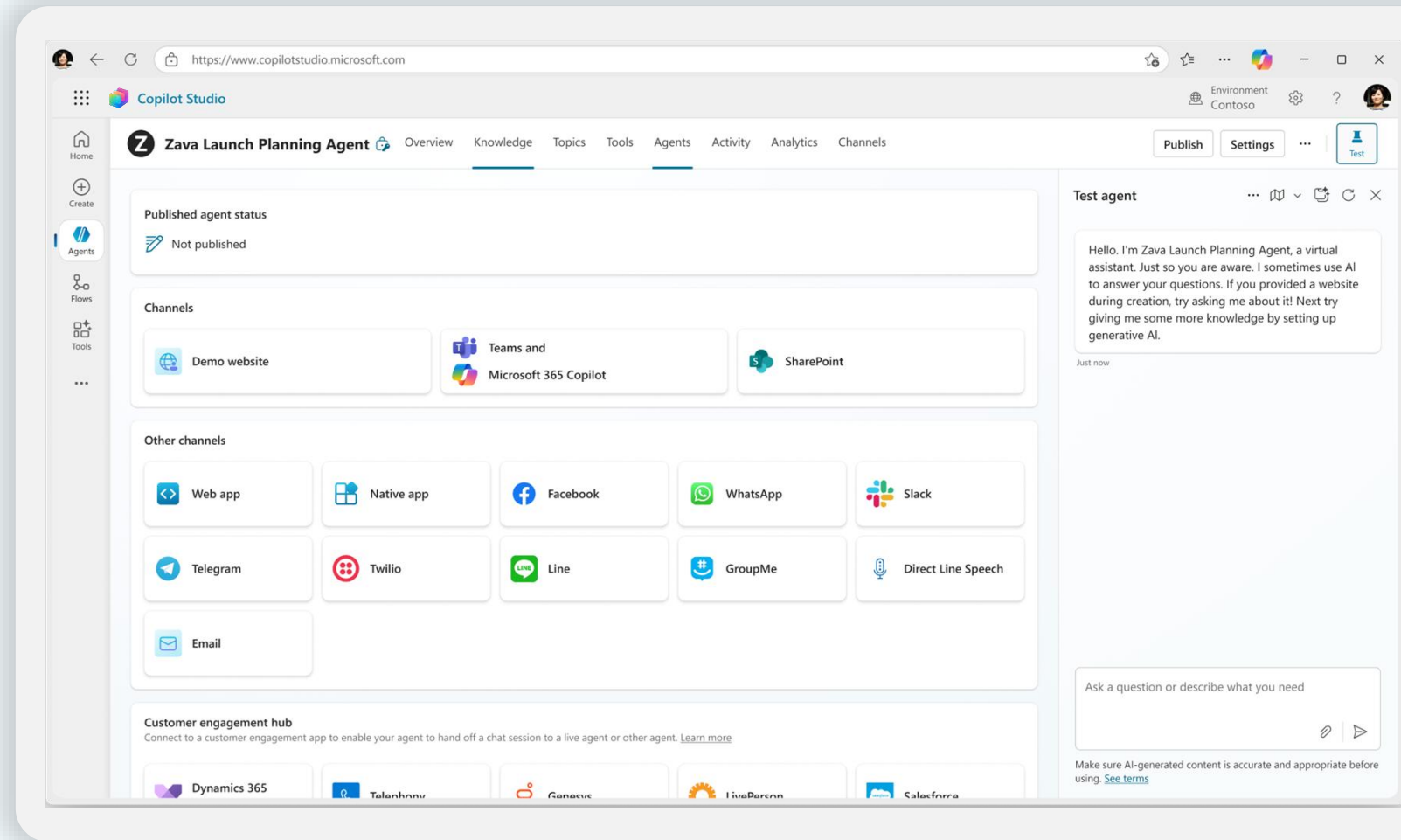


# User experience



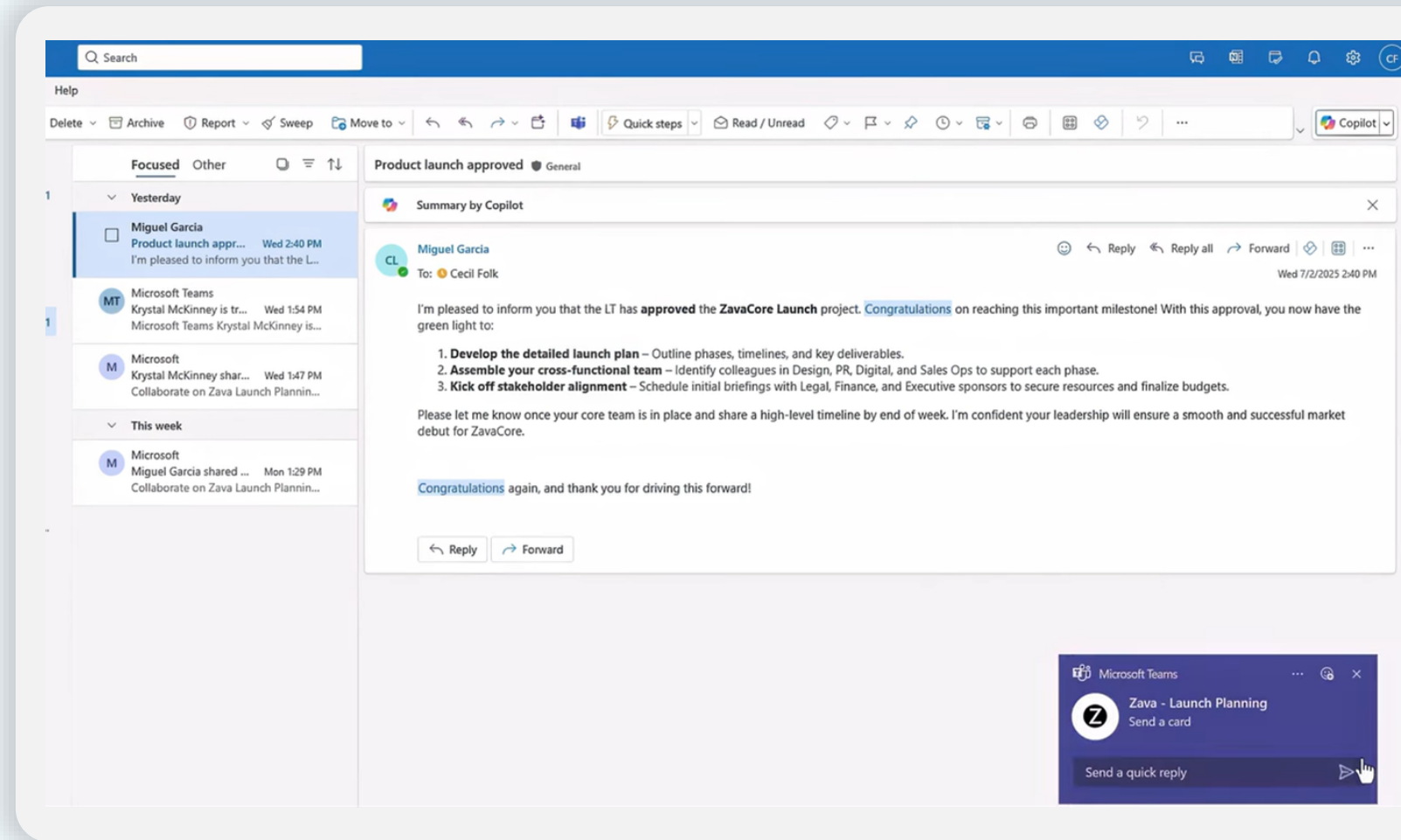
# Choose a channel

Finally, we'll deploy our agent to the Microsoft 365 Copilot + Teams channel so our employees can easily access it where they already work.



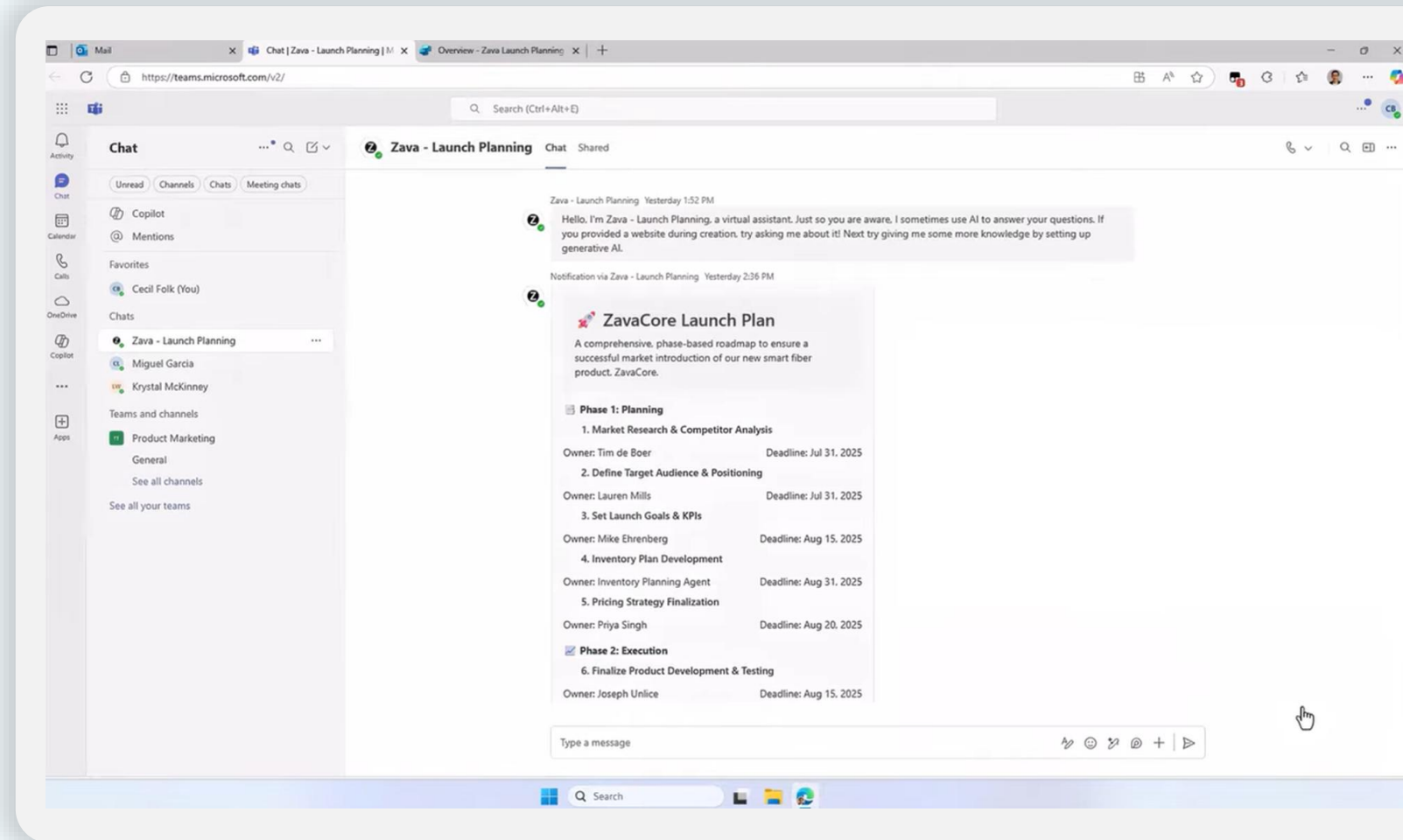
# Choose a channel

Once it's been autonomously triggered, it's going to send our users a notification via our task management tool, Microsoft Planner.

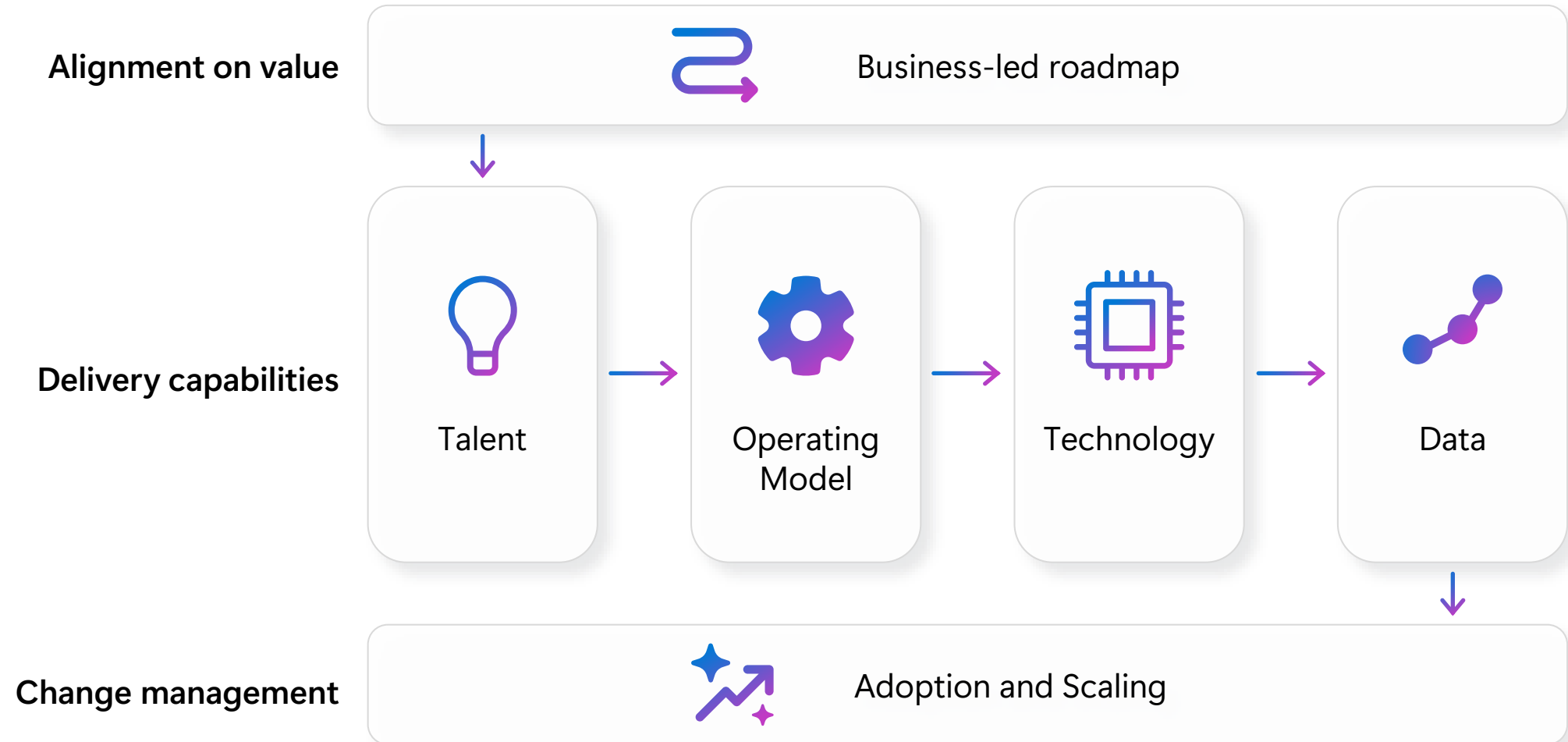


# Choose a channel

They'll be able to review the launch plan, deadlines for each task and who's been assigned - right in Teams.



# Approach for AI transformation



# How to get started

Envision the “Art of the Possible”  
*(1-2 workshops)*

Prioritize use cases by impact and feasibility

---

Discuss major enablers and requirements  
for change

---

Create a future state view for one workflow

and/or

Lighthouse use cases &  
planning for scale  
*(4-6 weeks)*

Lighthouse use case implementation (3-5x)

---

Develop long-term implementation roadmap  
and business case

---

Rewiring – Requirements for successful scaling

# Take the next step on your AI transformation journey

[Explore how AI agents are changing  
the way we work](#)



[Learn how to build agents  
your way](#)



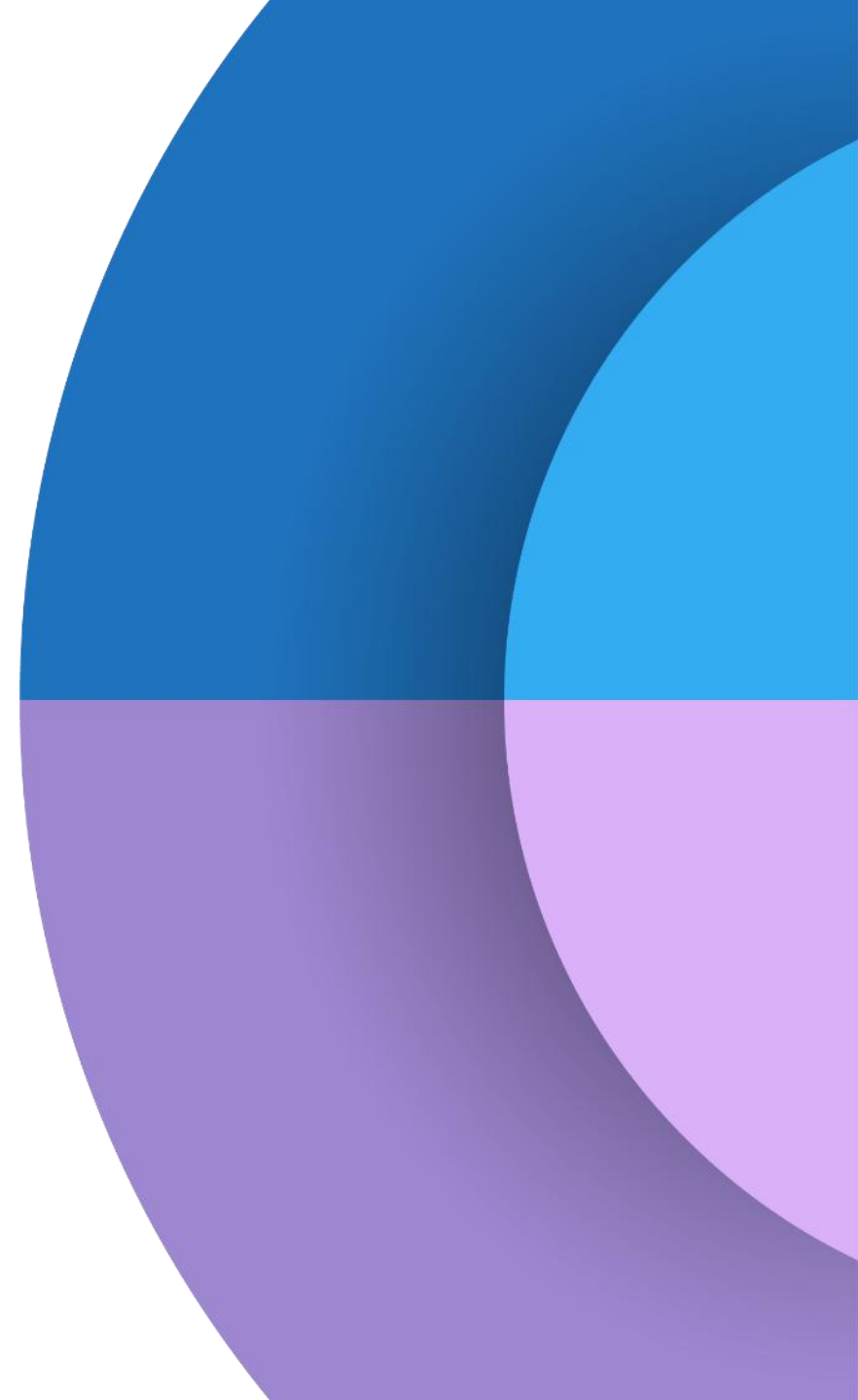
[Get started with AI agent adoption  
resources](#)



[Try a free trial of Copilot Studio](#)



Thank you



# Appendix

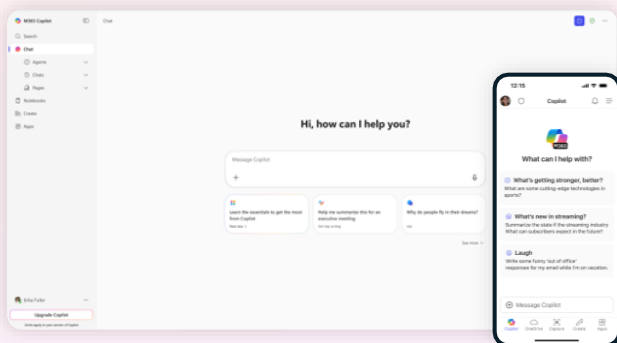


# Agent creation options

Feature	Agent builder	Copilot Studio
Access point	<a href="https://www.microsoft365.com/copilot">www.microsoft365.com/copilot</a>	<a href="https://www.microsoft.com/en-us/microsoft-365-copilot/microsoft-copilot-studio">www.microsoft.com/en-us/microsoft-365-copilot/microsoft-copilot-studio</a>
User type	Information workers	Makers and developers
Agent target audience	Individuals or small teams	Department, organization, or external customers
Agent type	Lightweight Q&A agents with organizational knowledge	Agents with complex scenarios like multi-step workflows or business system integration, and that require enterprise governance and robust controls
Key capabilities	<ul style="list-style-type: none"> <li>Natural language authoring</li> <li>Content-focused Q&amp;A scenarios based on organization context from Microsoft Graph</li> <li>Respects user permissions to Microsoft 365 data</li> <li>Uses the Microsoft 365 Copilot orchestrator, foundation models, and services</li> </ul>	<ul style="list-style-type: none"> <li>Broad and external publishing</li> <li>Supports multistep logic, approvals, and branching workflows</li> <li>Supports advanced AI models and integration with Foundry services</li> <li>Provides access to prebuilt and custom connectors to connect with data sources beyond Microsoft 365</li> <li>Autonomous capabilities</li> <li>Lifecycle management tools including versioning; development, test, and production environments; role-based access controls; and telemetry and analytics</li> </ul>
Use cases	<p>Use the agent builder experience to build:</p> <ul style="list-style-type: none"> <li>Project FAQ bots that answers common questions based on project documentation.</li> <li>Product documentation assistants that help employees find information from internal product manuals or wikis.</li> <li>Onboarding agents that help new team members get answers from internal knowledge bases.</li> </ul>	<p>Use Copilot Studio to build:</p> <ul style="list-style-type: none"> <li>Customer support agents that create support tickets and escalates issues to a human</li> <li>IT help desk triage agents that handle employee IT requests and routes them to the right support team</li> <li>Sales assistants for CRM that retrieve sales data, makes notes, or kicks off an approval workflow</li> </ul>
Management and governance	Managed primarily through the Microsoft 365 admin center	Managed through the Power Platform admin center with finer-grained controls for enterprise scenarios



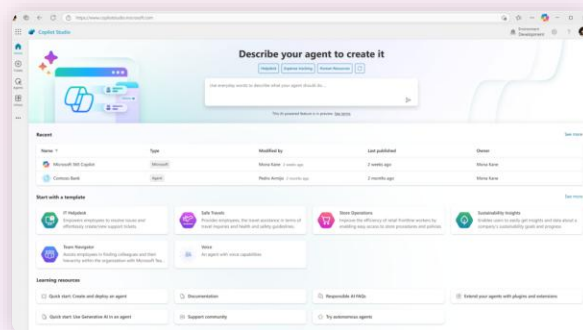
# Microsoft 365 Copilot Chat



## Chat

Secure web-grounded AI chat on the App and web, and in Microsoft 365 productivity apps

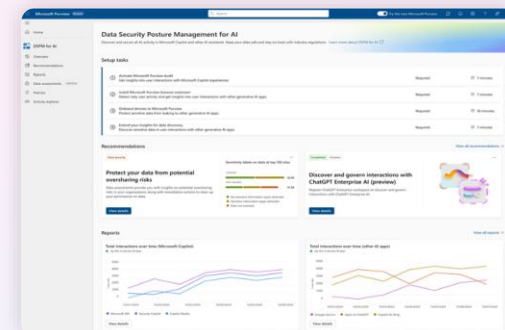
+



## Agents

Integrated into the chat experience and paid for on a consumption basis

+



## IT Controls

Enterprise Data Protection and agent management



# Personalize Copilot by building agents within Chat

1

## Describe

Describe the agent that you'd like to build or try a template

2

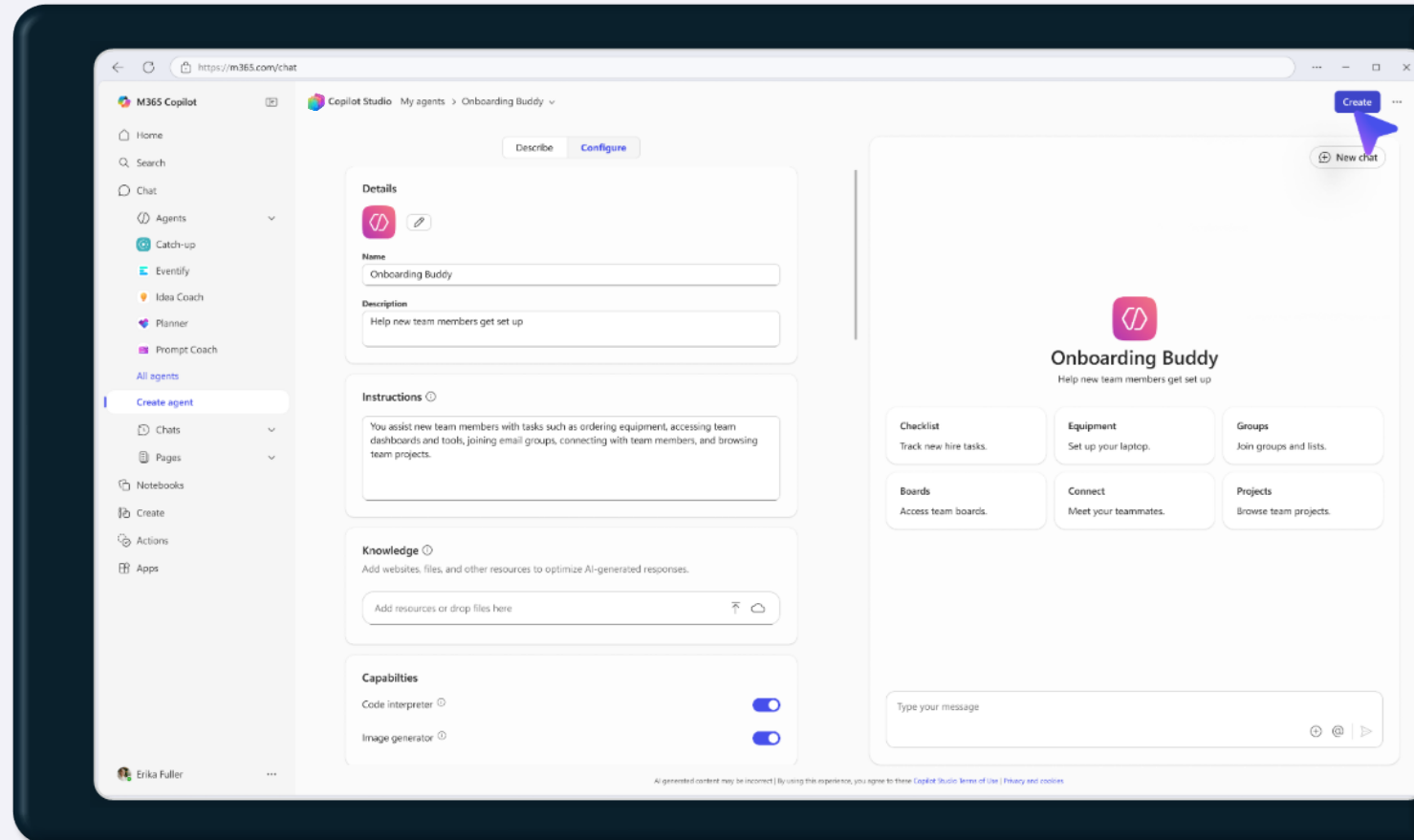
## Configure

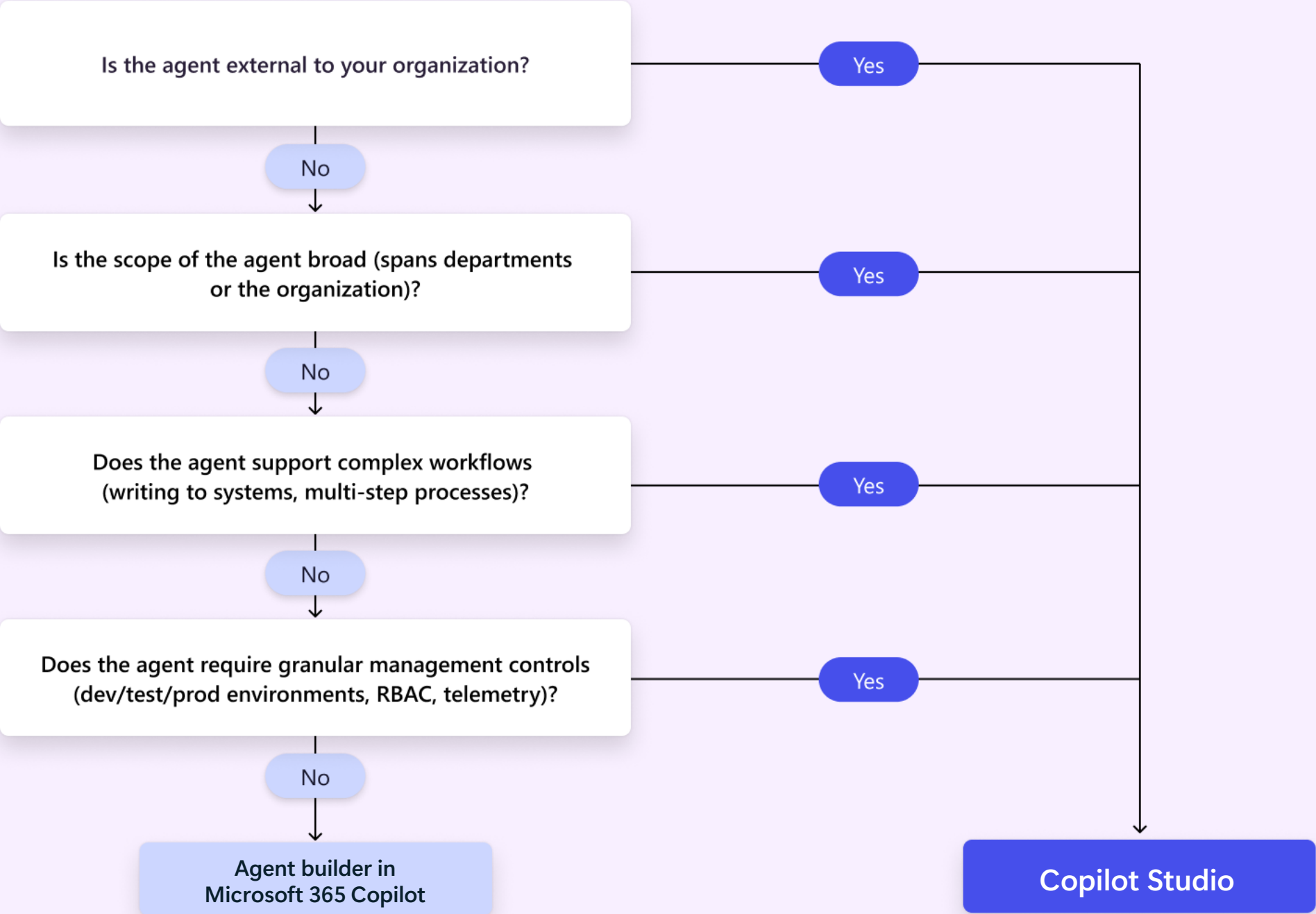
Add knowledge sources and capabilities

3

## Try

Test out some prompts to see if the agent is working as planned





# Design with code side-by-side

Pick the view that's most efficient for building your agent

Seamlessly switch between the graphical user interface and code editor

The code editor provides a YAML-like experience to make inline edits to the agent

Developers can share and re-use topic logic

```
1 kind: AdaptiveDialog
2 beginDialog:
3   kind: OnSelectIntent
4   id: main
5   triggerBehavior: Always
6   actions:
7     - kind: SetVariable
8       id: setVariable_M6434i
9       variable: init:Topic.IntentOptions
10      value: =System.Recognizer.IntentOptions
11
12     - kind: SetTextVariable
13       id: setTextVariable_0
14       variable: Topic.NoneOfTheseDisplayName
15       value: None of these
16
17     - kind: EditTable
18       id: sendMessage_g5Ls09
19       changeType: Add
20       itemsVariable: Topic.IntentOptions
21       value: "{ DisplayName: Topic.NoneOfTheseDisplayName, TopicId: \"NoTopic\", TriggerId: \"NoTrigger\", Score: 1.0 }"
22
23     - kind: Question
24       id: question_zf2HhP
```

# Choose your own AI model

Access flexible model options across knowledge, tools and prompts

## Managed models

Best-in-class models **curation** for specific scenarios

No change **management** for new model releases

No need for **management** of your own GPU infra

Ensure **responsible AI controls** apply by default

Default  
model<sup>1</sup>

vNext  
model<sup>2</sup>

Scenario  
specific  
models<sup>3,4</sup>

Fine-tuning  
service

## Bring your own model

Enable **self-managed access** to custom models  
from Foundry Model Catalog

1,800+ models  
from Foundry<sup>5</sup>

Models fine-tuned  
using Foundry

<sup>1</sup> Currently GPT 4o

<sup>2</sup> Currently GPT 4.5

<sup>3</sup> like reasoning, CUA, code-gen etc

<sup>4</sup> Currently o1 & o3-mini for reasoning

<sup>5</sup> Launching in prompts and answers as preview

# Bring your own model

Transform your business with Foundry Models in Copilot Studio—unlocking smarter, faster, and more efficient solutions



Access to Foundry models



Improving Efficiency



Improving Quality



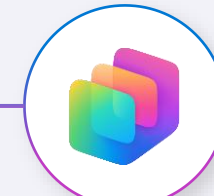
Accelerating timelines



Support for Innovation



Prompt



Copilot Studio



Agents

Foundry Models

O1

LLAMA

Phi-4

Claude

Gemini

GPT 4.1

DeepSeek

Mistral 3B



Microsoft Foundry



# Models: Foundry model breadth

Offering a wide collection of foundation and open models

## Azure OpenAI Service

O3 mini – for reasoning  
o1-preview – for reasoning  
o1-mini – for reasoning  
GPT-4o  
GPT-4o mini  
GPT-4-Turbo with Vision, GPT-4, GPT-3.5  
DALL-E  
Embeddings

## Phi models

Phi-3-mini  
Phi-3-small  
Phi-3-medium  
Phi-3-vision  
Phi-3.5-mini  
Phi-3.5-vision  
Phi-3.5-MoE  
Phi-4  
Phi-4-mini  
Phi-4-omni

## Meta

Meta-Llama-3-70B/70B-Instruct  
Meta-Llama-3-8B/8B-Instruct  
Meta-Llama-3.1-70B/70B-Instruct  
Meta-Llama-3.1-8B/8B-Instruct  
Meta-Llama-3.1-405B-Instruct  
CodeLlama-7b/13b/34b/70b-Instruct/Python-hf

## Mistral AI

Mistral Large  
Mistral 7B  
Mixtral 8x7B – Mixture of Experts  
Ministral  
Codestral

## Cohere

Cohere R+  
Cohere R  
Cohere Rerank  
Command and Embed  
Embed v3-Multilingual  
Embed v3-English

## Hugging Face

Falcon/TII  
Stable Diffusion/Stability AI  
Dolly/Databricks  
CLIP/OpenAI

## Databricks

Databricks/dbrx-base  
Databricks/dbrx-instruct

## NVIDIA

Nemotron-3-8B-4K  
Nemotron-3-8B-Chat-SFT/  
RLHF/SteerLM  
Nemotron-3-8B-QA

## Snowflake

Snowflake/arctic-base  
Snowflake/arctic-instruct

## Others

AI21 Jamba 1.5 Large + Jamba 1.5 mini  
Core42 JAIS  
deci (Deci AI)  
Nixtla TimeGEN-1  
SDAIA (Arabic Model)  
Bria AI  
NTT Data Tsuzumi  
DeepSeek-R1

# Copilot Tuning

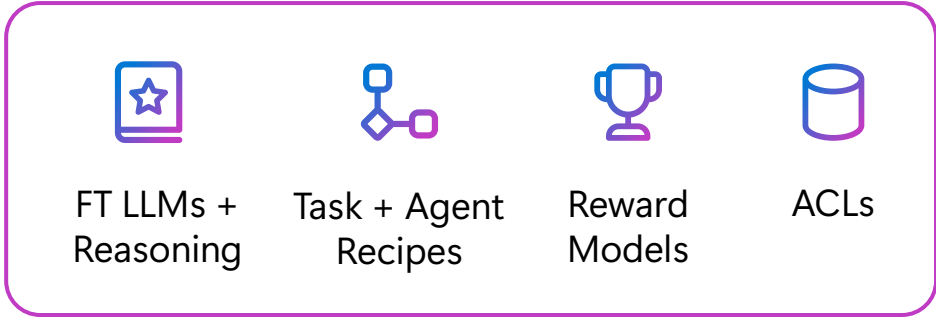
A “learn-it-all” Enterprise Brain that knows what you know, and...

Use Case	FT Technique	Example – <i>For a legal firm</i>
Talks like you	Supervised Tuning	Generates legal documents in line with the <b>syntax</b> (e.g., structure and formatting) and <b>semantics</b> (e.g., tone and style) of the organization
Thinks like you	Reasoning Finetuning	Reasons through existing literature, past outcomes, and client context to present arguments that are <b>grounded in firm’s thinking</b> and can maximize the odds of winning
Works like you	Agentic Finetuning	Combines different agents and finetuned models to <b>deliver a full-fledged role/AI colleague</b> , e.g., a Paralegal/ Associate in a Law Firm

Your AI is built on your experience, expertise & on your M365 usage

# How Copilot Tuning works

## Copilot Tuning

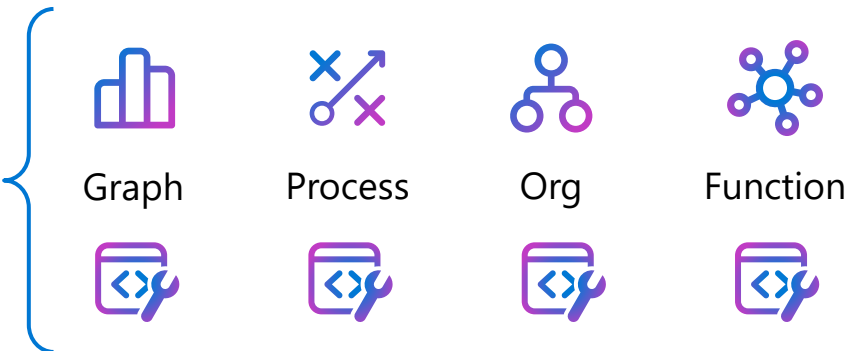


## Task Automation

- Document Generation
- Summarization
- Expert Question & Answer
- Analysis & Validation
- Product Documentation
- Business Insights
- Compliance Checks
- Templatization

↑  
*How is task done?*  
*Who all collaborate?*  
*How is success measured?*  
*Who has access to what?*  
*Where are the inefficiencies?*

  
M365 +  
Connector data  
+ Connectors



## Functions



# Benefits of Copilot Tuning



## State of Model Customization

**White glove** – need army of data scientists for extended time

---

Provide partner **eyes-on** access to data

---

**Limited security** for training or inference

---

**Very limited integration** with M365 and Microsoft products



## Copilot Tuning

**Low code** post training for most high value tasks

---

Self-serve turnkey solution with **eyes-off** data access

---

Secure tenant-isolated training in **M365 Compliance boundary**

---

Agents natively **integrate with M365 Copilot & Apps**

---

**Respects access controls** in place governing your data

# Instructions

Define your agent's behavior using natural language

Tell your agent what to do, how to respond, and when to act using a simple conversational experience – no coding required.

Ensure your agent follows best practices and business rules every time.

Easily add reference to specific objects such as tools, topics, triggers, knowledge sources, variables or Power Fx expressions in line.

Enable deep reasoning by specifying which tasks the agent should spend more time thinking about.

The screenshot displays the 'Instructions' configuration interface. At the top, there's a 'Saved' status and icons for undo and redo. The main text area contains instructions for the agent to respond to requests for educational, legal, wellness, and health information, and to provide details in tabular format. Below this, there's a 'Knowledge' section with a list of topics: 'Anything Else', 'Fetch DOB', 'Fetch PersonID from UPN', 'OnInstallationUpdate', and 'Thank you'. A 'Web Search' section is visible with a 'Disabled' toggle. The 'Tools' section has an 'Add tool' button. A dropdown menu is open over the 'Knowledge' section, showing the list of topics.

# Deep reasoning

Enable your agent to handle complex tasks and return more accurate responses

Preview





Makers can add deep reasoning to the agent workflow by specifying the need within the agent instructions.

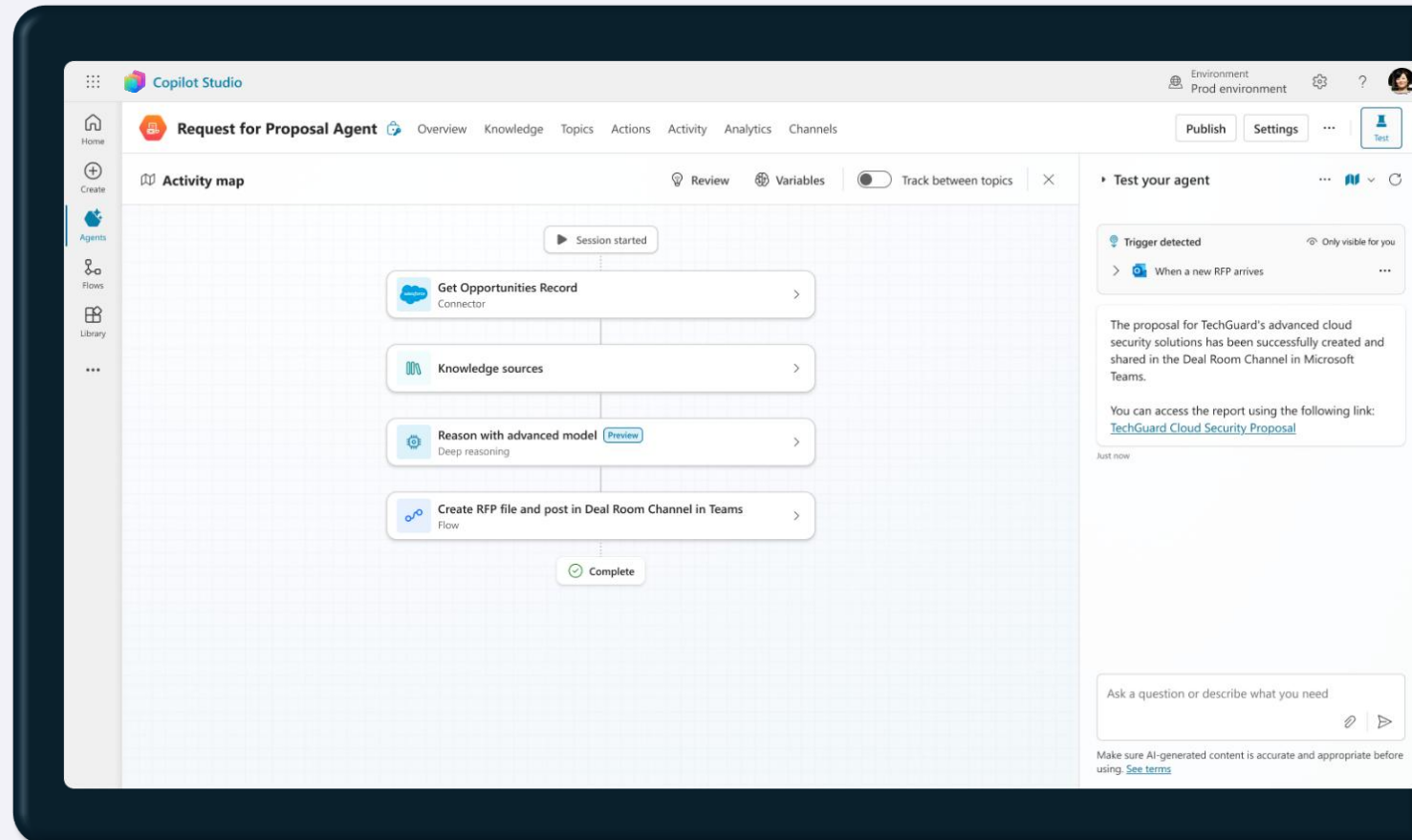
Agents use reasoning models like Azure OpenAI o3 model with enterprise data to complete complex tasks.

Agents can spend more time thinking before responding, leading to greater accuracy in solving tasks that require:

- Logical reasoning
- Problem-solving
- Step-by-step analysis
- Organizational context
- In-depth analysis of unstructured data

## Example use cases

-  Evaluate market trends
-  Review contracts
-  Analyze supply & demand patterns
-  Solve differential equations



The screenshot displays the Copilot Studio interface for a 'Request for Proposal Agent'. The main area shows an 'Activity map' with a flowchart of tasks: 'Session started' leads to 'Get Opportunities Record' (Connector), which leads to 'Knowledge sources', then 'Reason with advanced model' (Deep reasoning, marked as 'Preview'), and finally 'Create RFP file and post in Deal Room Channel in Teams' (Flow), ending at 'Complete'. The right sidebar shows a 'Test your agent' section with a 'Trigger detected' event 'When a new RFP arrives' and a generated response: 'The proposal for TechGuard's advanced cloud security solutions has been successfully created and shared in the Deal Room Channel in Microsoft Teams. You can access the report using the following link: [TechGuard Cloud Security Proposal](#)'. A text input field at the bottom right prompts the user to 'Ask a question or describe what you need'.

# Generative orchestration

Let your agent use AI to choose the best tools, knowledge, topics, and other agents to respond to queries or triggers

Handle variable, multi-step and conversational scenarios by dynamically adapting to user input and context

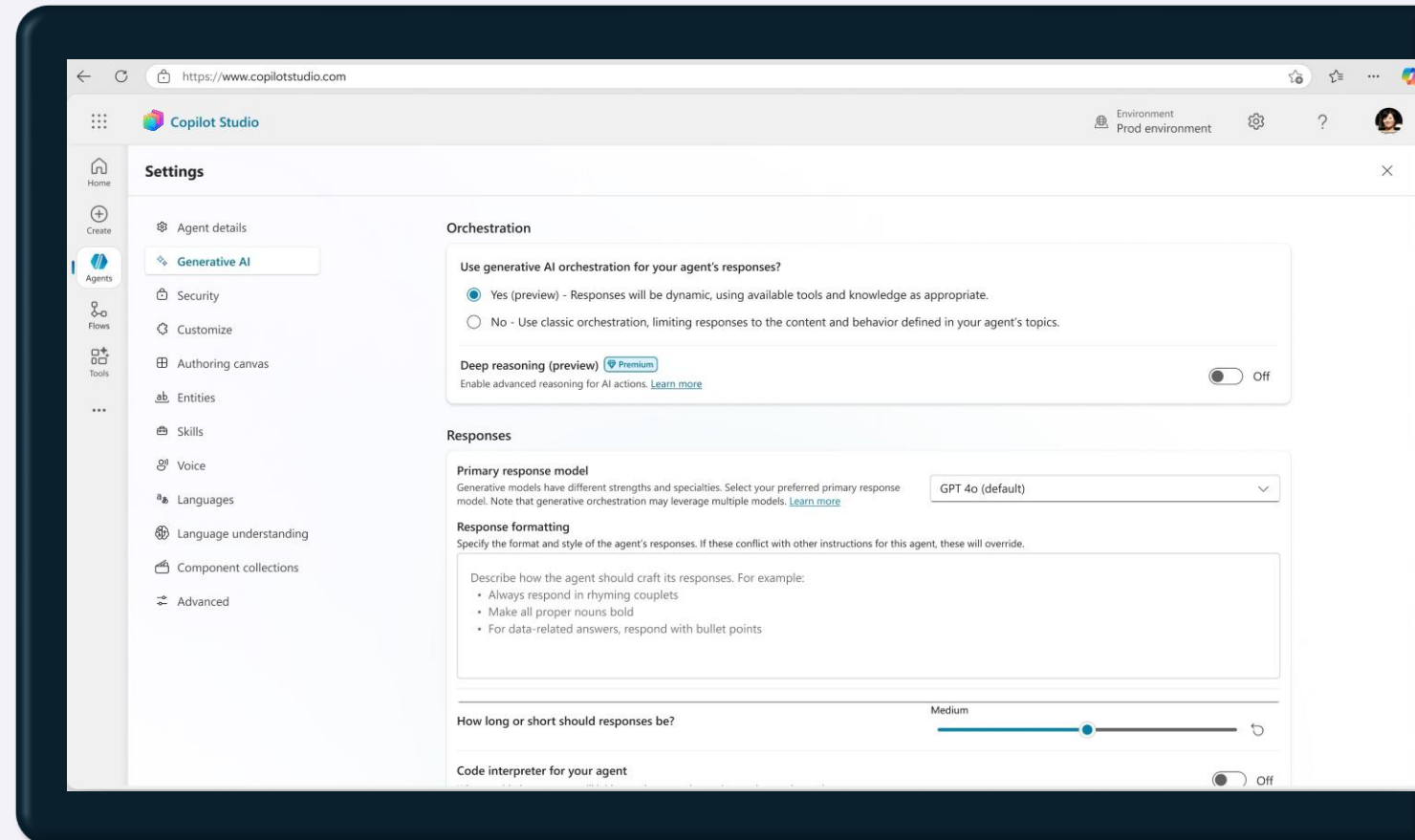
By default, newly created agents are configured to use generative orchestration

## How it works

- 1 Detects user intent in real time
- 2 Selects and sequences the right tools, plugins, and knowledge sources
- 3 Executes actions and delivers personalized responses—no need to predefine every path

## Key benefits

- ✓ Rapidly automate new scenarios without rebuilding flows
- ✓ Tailor responses and actions to each user and situation
- ✓ Less manual authoring, more scalable automation



# Unlock your enterprise knowledge

Enable your agent to use generative AI to answer user queries

Have multi-turn, context aware conversations using knowledge from multiple internal and external sources, including unstructured data

Connect an 'empty' agent to knowledge and deploy for an instantly useful agent that requires no further authoring

Enable the agent to also use its own general knowledge or search all public websites indexed by Bing

Analyze images and files uploaded by the end user within the conversation

Leverage semantic search to improve search results

Add user authentication so the agent only surfaces content that a specific user can access

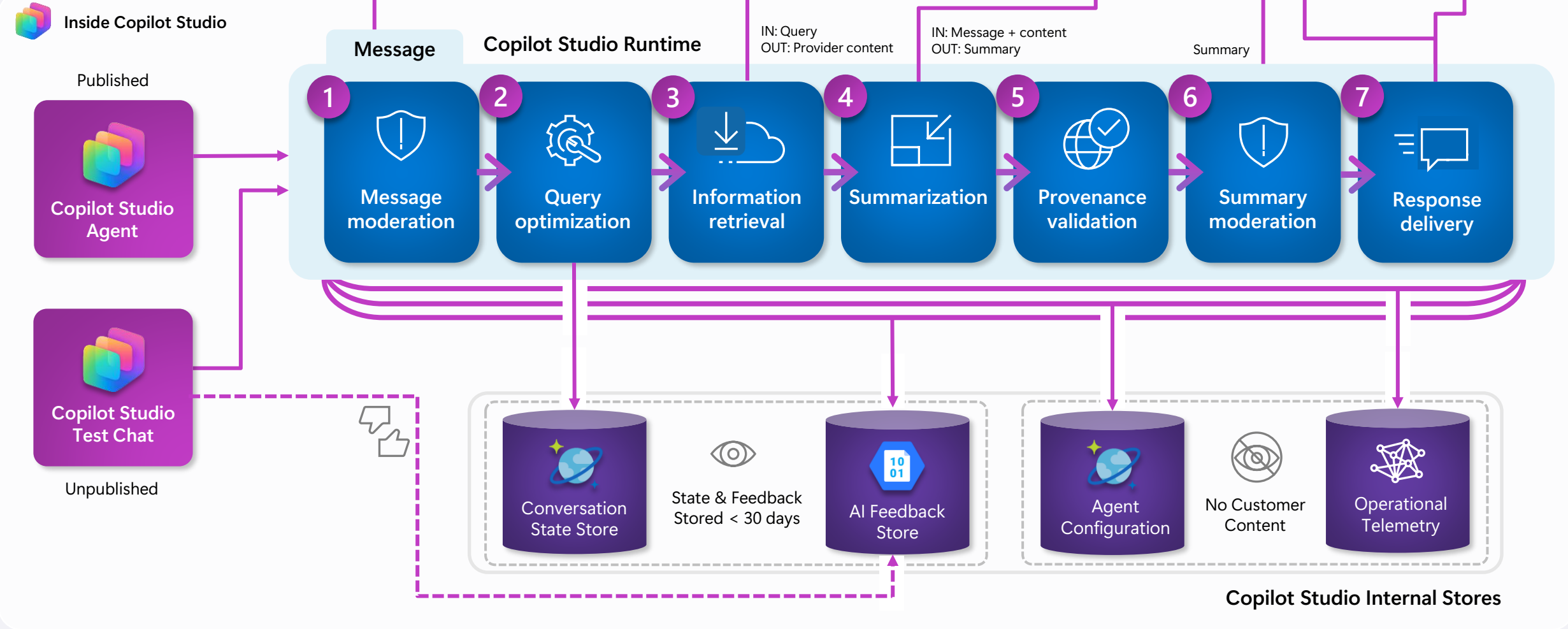
Control the level of content moderation from low to high

Access actionable insights for response quality and questions that generative AI left unanswered

The screenshot displays the Copilot Studio interface for a 'Helpdesk agent'. The top navigation bar includes 'Home', 'Create', 'Agents', 'Flows', and 'Tools'. The main content area is titled 'Helpdesk agent' and includes a 'Generative AI Settings' section with a description: 'Manage your agent's dynamic behavior and responses, moderation policies, and more.' Below this is an 'Open settings' button. To the right is an 'Overview' dashboard with three key metrics: 'Total source use' at 78% (up 5%), 'Error rate' at 11% (down 8%), and 'Total answer rate' at 87% (down 2%). Below the dashboard is a table of entity types with columns for Name, Type, Last modified, and Status.

Name	Type	Last modified	Status
Salesforce	Badge	Mona Kane Just now	Ready
ServiceNow	Badge	Mona Kane Just now	Ready
Device list	Badge	Lucine Homs 1 day ago	Ready
Device refs intranet	Badge	Mona Kane 2 days ago	Not allowed
Agreements 2024	Badge	Lucine Homs 5 days ago	Ready
List of newly added devices	Badge	Lucine Homs 5 days ago	Error
Rental agreement appendix 2024	Badge	Lucine Homs 5 days ago	Ready

# Generative answers architecture



# Agent flows

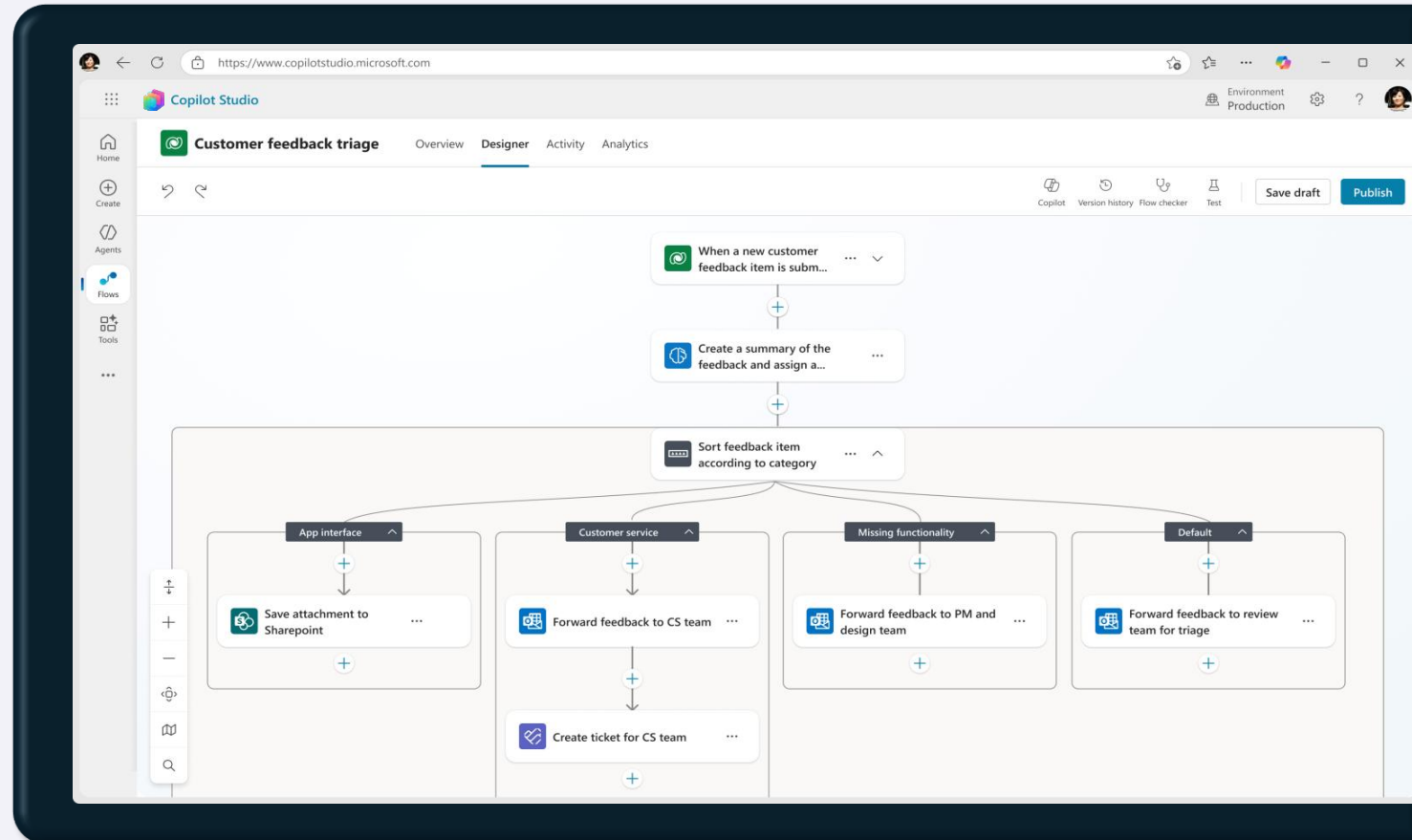
Accelerate your agents with fixed automation pathways

Enable your agents to accomplish objectives faster by equipping them with fixed automation pathways that don't rely on agent reasoning and orchestration at every step

Agent flows execute repetitive tasks quickly by precisely following a predefined sequence of agent flow actions

Enhance agent flows with targeted use of intelligent actions for processing information, making decisions, simplifying complex steps, and more

Leverage advanced new features such as multi-stage and conditional approvals to manage complex approval workflows that align with your real business processes



# Achieve better outcomes by mixing generative AI + agent flows

## Flexibility

Generative AI adapts to complex, variable scenarios and user intent, while agent flows ensure reliability for structured, mission-critical tasks.

## Efficiency

Automate routine steps with agent flows and handle exceptions or ambiguous requests with generative AI, reducing manual intervention.

## Scalability

Combine deterministic flows for compliance and repeatability with generative AI for rapid innovation and evolving business needs.

## Enhanced user experience

Deliver seamless handoffs—users get fast, accurate responses for standard tasks and intelligent, conversational support for complex queries.

## Business value

Accelerate time-to-value, reduce operational costs, and improve satisfaction by matching the right orchestration to each process.

# Make your agent autonomous

Build agents that plan, complete tasks, and run processes for you

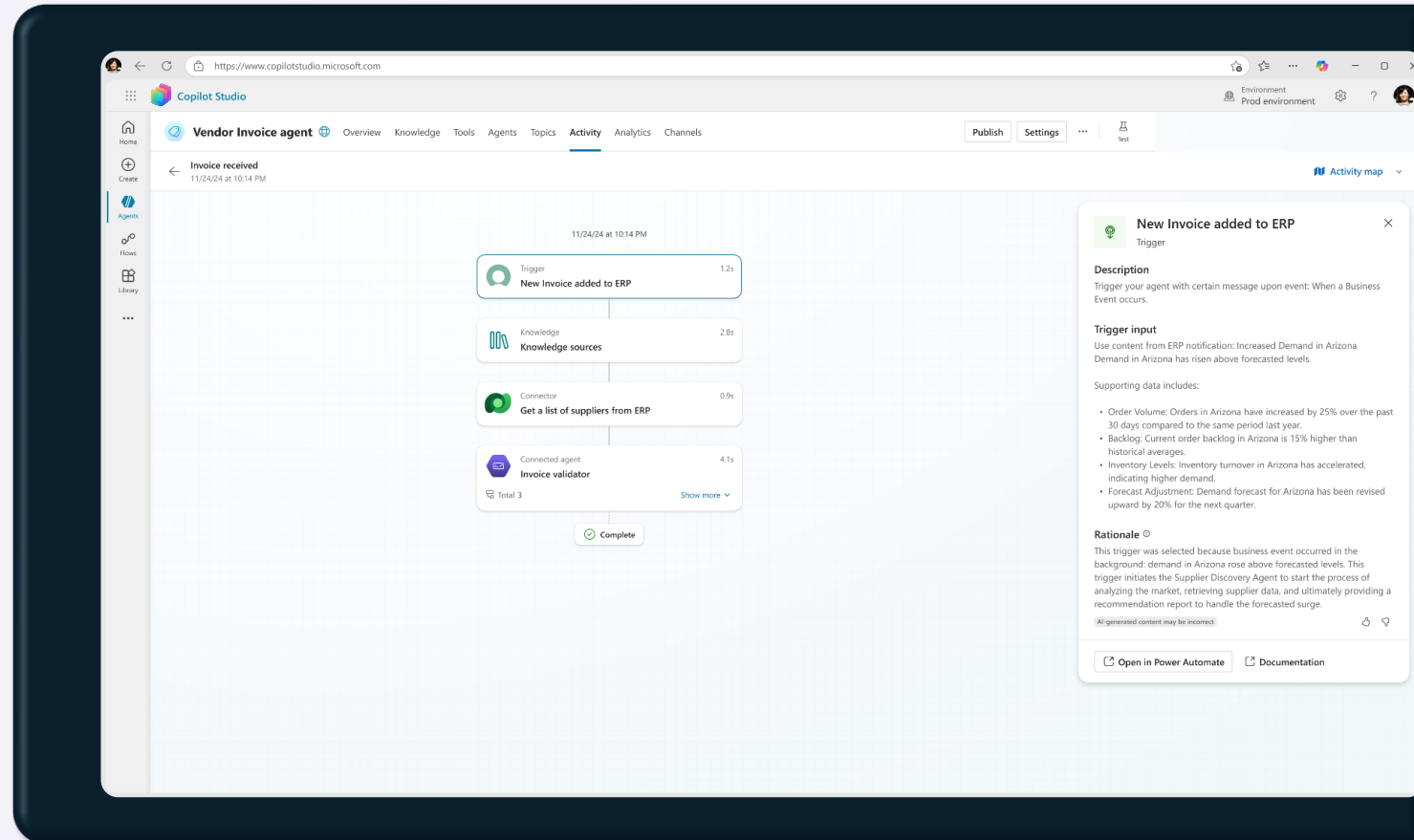
Independently begins work based on signals across your business

Automates long running processes

Dynamically reasons over its capabilities

Learns and improves

Follows human guard rails and asks for help



# Respond to events across your business with triggers

Configure agents to perform actions or call topics in response to something happening

Allow your agent to act on your behalf and without human input in response to signals

## Triggers can be:

- Event-based (email received, business event)
- User input (chat, Teams message)
- Scheduled (daily, weekly, monthly)

Access an extensive library of triggers for a range of events that can occur across your applications

Reduce manual intervention, speed up response time, and ensure consistency within your workflows

**Add a trigger** ✕

In addition to user input, your agent can respond to events. Search for an event trigger to enable the agent to take action automatically.

All **★ Featured** Library

9 triggers

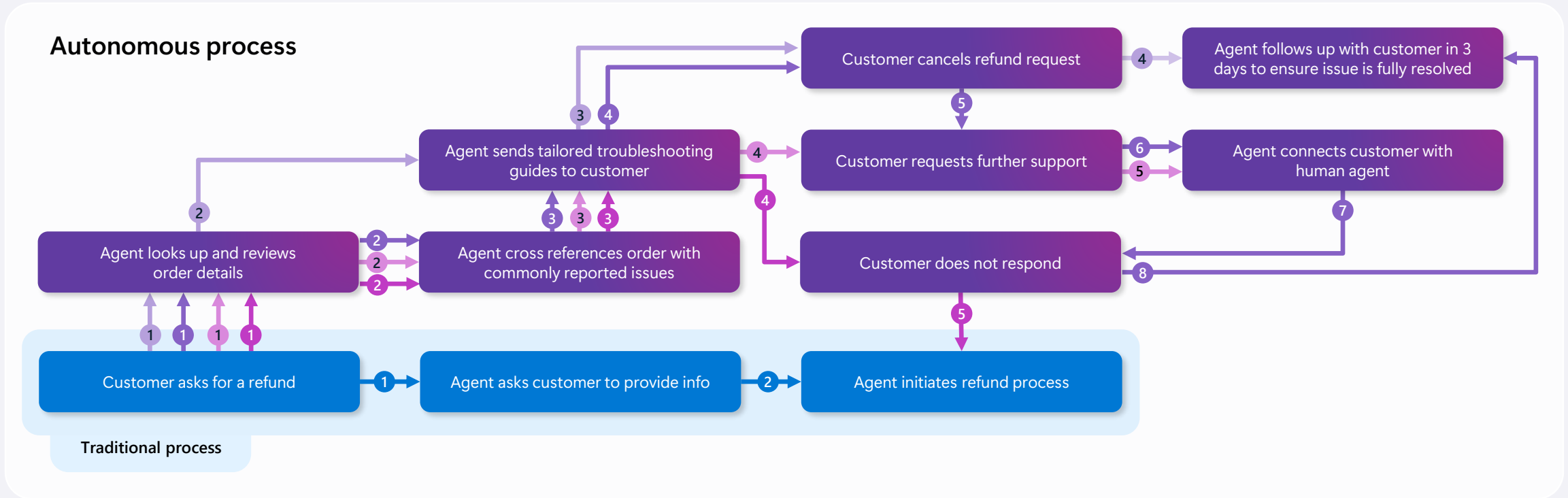
- Recurrence
- When a new response is submitted  
Microsoft Forms
- When an item is created  
SharePoint
- When an item is created or modified  
SharePoint
- When a file is created  
OneDrive for Business
- When a new channel message is added  
Microsoft Teams
- When a row is added, modified or deleted  
Microsoft Dataverse
- When a new email arrives (V3)  
Office 365 Outlook
- When a task is completed  
Planner

# Reinvent business processes with autonomous agents

Traditional agent

Autonomous agent

Runs 1-4      Run 1      Run 2      Run 3      Run 4



## Traditional

- Will break when encountering roadblocks
- Will follow a pre-defined, rules-based flow
- Great for control over repetitive processes

## Autonomous

- Will find a workaround when encountering roadblocks
- Will decide at runtime which steps need to be taken
- Great for open-ended processes



# Copilot Studio



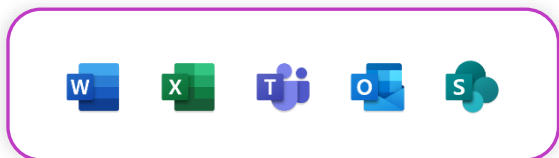
## Data connectors

External systems



## Microsoft Graph

Productivity data (Microsoft 365)



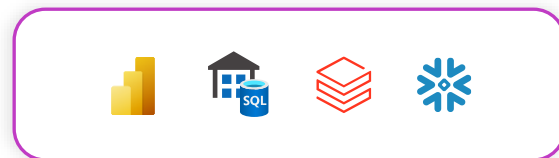
## Microsoft Dataverse

Business data



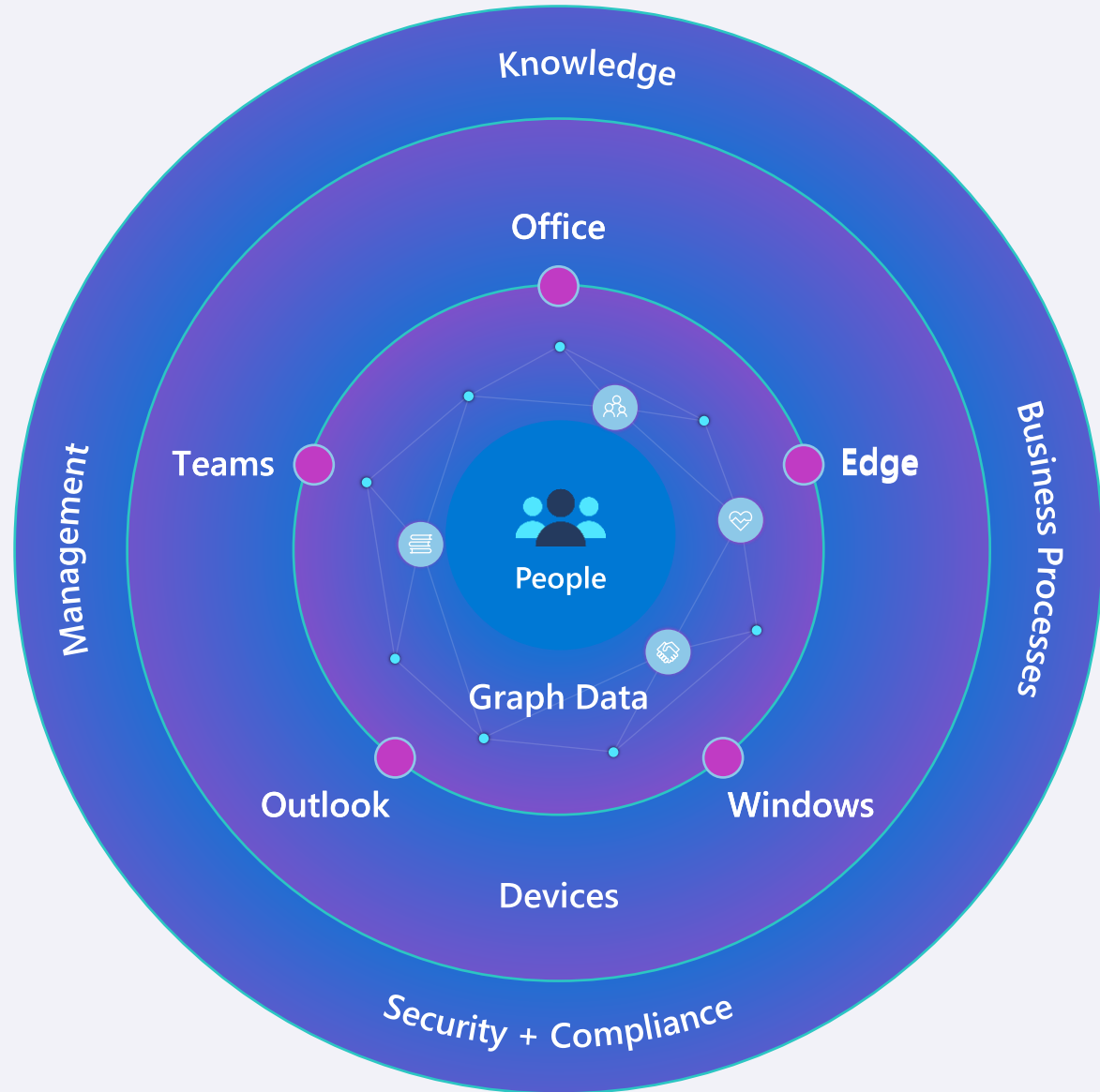
## Microsoft Fabric

Analytics



# Microsoft Graph

Automatically connects your data, people, and workflows across M365, enabling agents that are personal to your team and organization



# Bring your own knowledge with Azure AI Search

Enable agents access to your vectorized indices from Azure AI search for custom RAG

## Utilize company knowledge on Azure

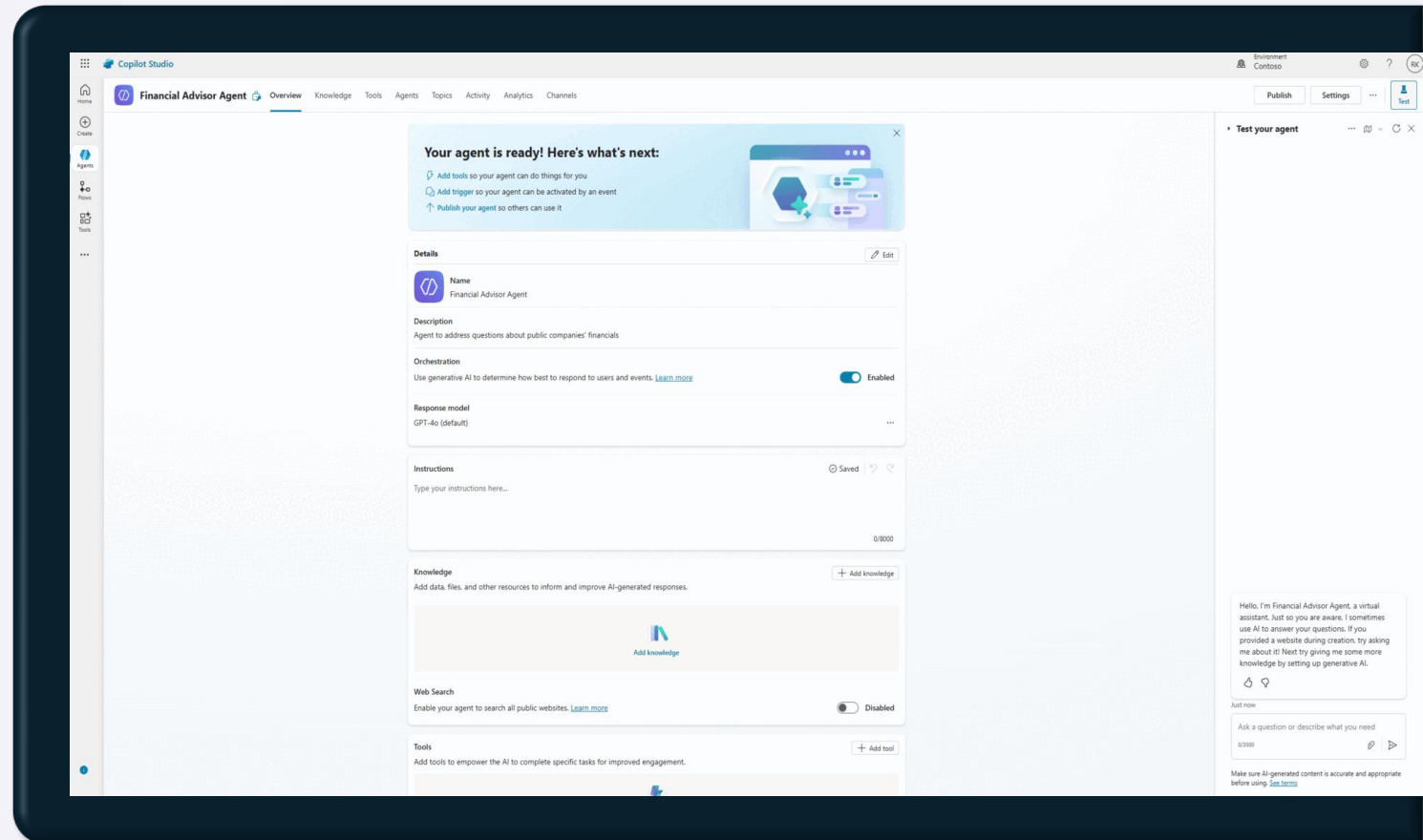
Leverage and unlock your knowledge with Azure AI Search for your agents

## RAG on vectorized indices

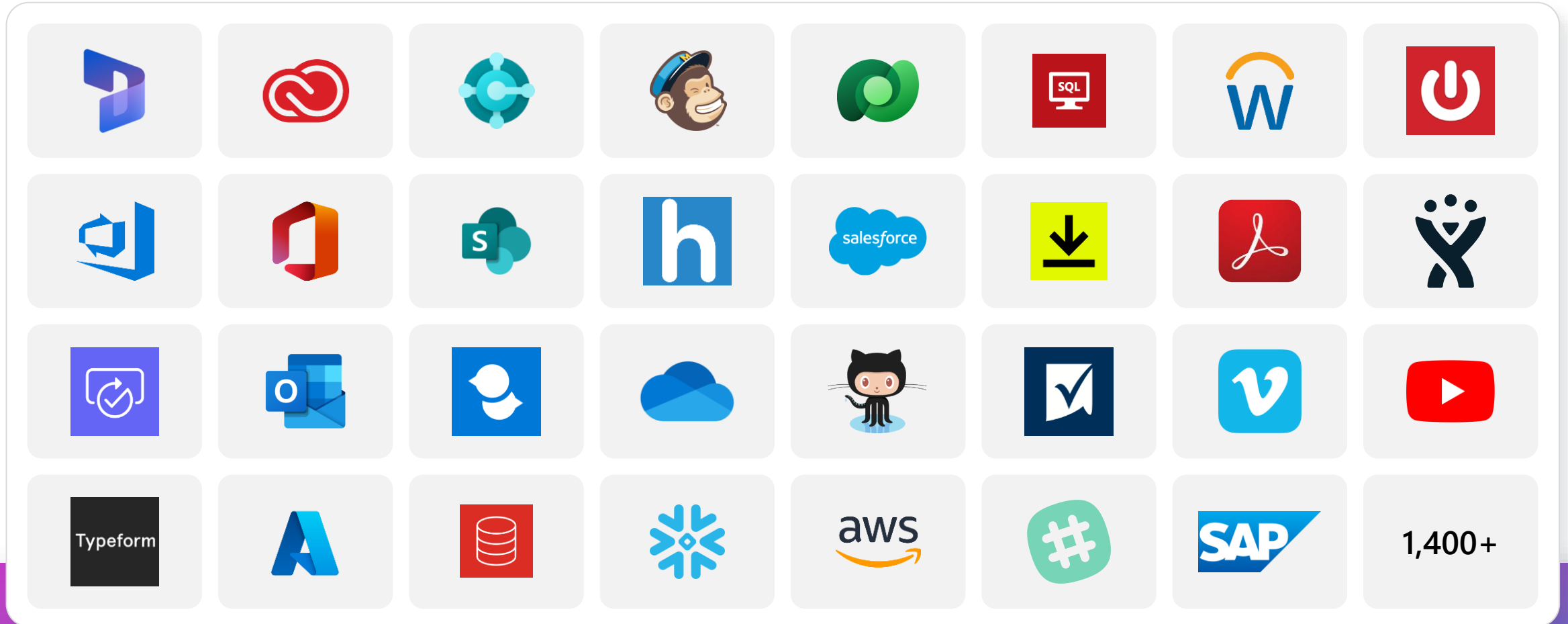
Utilize custom RAG built with Azure AI Search in Foundry

## Custom RAG without code

Easy intuitive experience with no code



# 1,400+ prebuilt connectors



every Microsoft 365, Dynamics 365, Azure service and  
the most common enterprise data platforms

# We've enhanced and expanded even more

 Azure SQL (GA)

 ServiceNow (GA)

 Salesforce (GA)

 Zendesk (GA)

 Snowflake

 Databricks

 SAP HANA

 Oracle

## Now Available

 PostgreSQL

 Freshdesk

 Google Sheets

 JIRA

 MySQL

# Create your own custom connectors

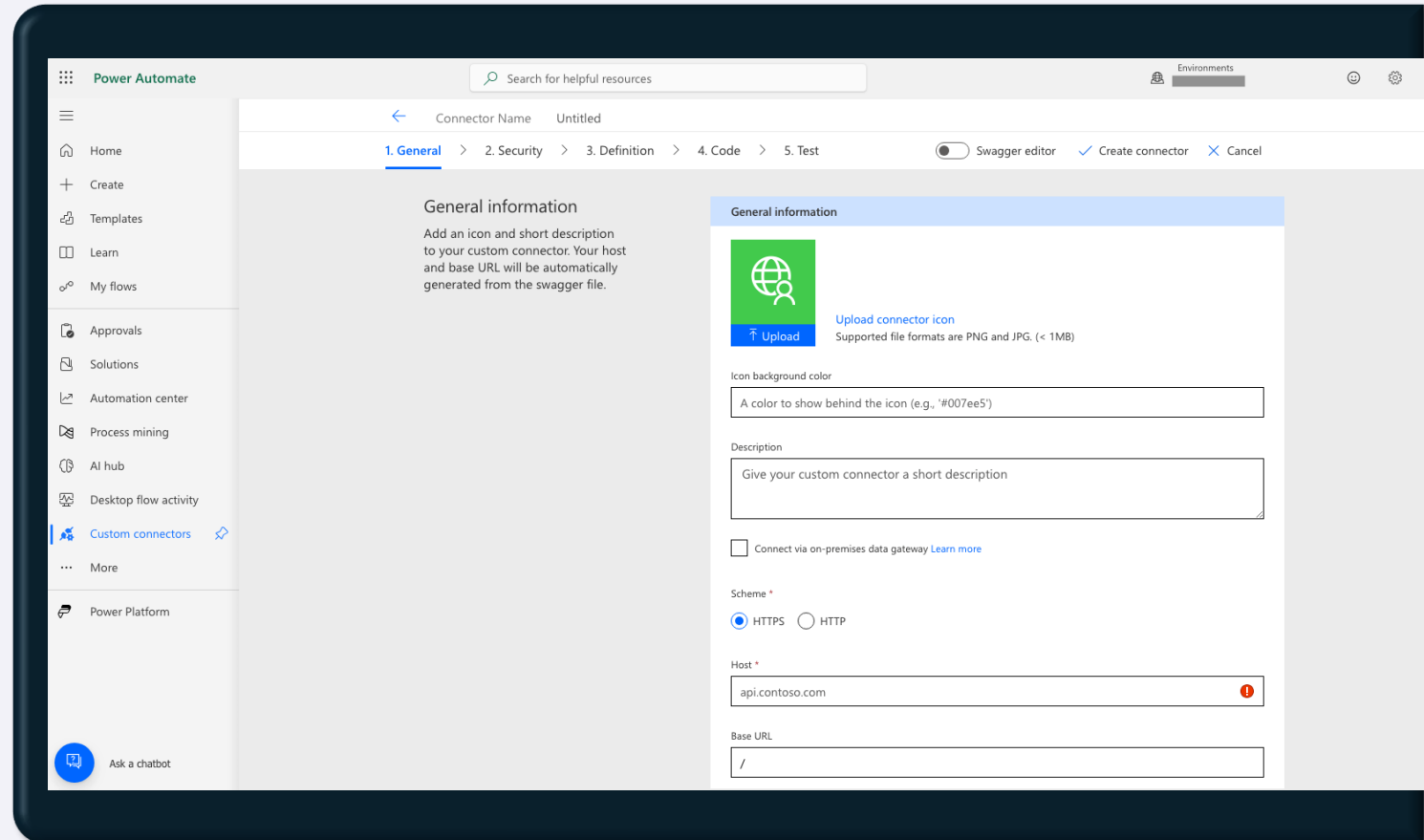
Build a wrapper around a REST API with triggers and actions

Easily create custom connectors to communicate with services that aren't available as prebuilt connectors

Build your connectors in Power Automate or Power Apps for use in Copilot Studio

Get step-by-step guidance for building and securing your connector

Share your connector with other makers across your org



# Enhanced Connector SDK



Zero data copy



Read and write capabilities



Knowledge-enabled



Fully governed



Go to GitHub and start building

# Build custom prompts

Configure tailored AI actions using a simplified prompt engineering interface

The image shows a screenshot of the Copilot Studio 'New prompt' interface. The interface is divided into two main sections: 'Instructions' on the left and 'Model response' on the right. The 'Instructions' section contains a text area with a prompt: 'Evaluate the sentiment of the given user comment, being mindful of its tone, context, and substance. The response should be courteous and show understanding, addressing all inquiries or tasks highlighted. Keep the response succinct and straightforward, steering clear of vagueness. Should the message convey a grievance or unhappiness, express acknowledgment and readiness to help. Use a fitting closure for formal exchanges, and for customer questions, clarify subsequent actions or request further details if needed. Before sending, review for grammatical precision and cultural appropriateness.' Below the text area are buttons for 'Feedback' and 'Account', and a section for 'Get started with Copilot' with a search bar and 'Or start from a prompt template' section containing three options: 'Summarize a document', 'Extract information from text', and 'Classify text'. The 'Model response' section shows a sample response: 'Subject: Re: Issue with Reliance + Approval Feature', 'Hi Lana,', 'Thank you for reaching out and sharing your concerns regarding the approval feature in Reliance +. I understand how frustrating it can be when technology doesn't work as expected, especially with an upcoming demo for your project.', 'To assist you better, could you please provide more details about the error message you are receiving? Additionally, if you could share the specific settings you have tried adjusting, that would be helpful in diagnosing the issue.', 'I appreciate your patience, and I'm here to help you resolve this as quickly as possible.', 'Best regards, [Your Name], [Your Position], [Your Contact Information]'. The interface also includes a 'Save' button in the top right corner and a 'Test' button in the top right of the instructions area. Callout boxes point to various features: 'Choose a specific model (GPT-4o mini, GPT-4o, o1) that is best suited to run a given task' points to the model selection dropdown; 'Provide specific instructions on how to perform individual tasks' points to the main text area; 'Define input variables to process text, documents or images' points to the 'Add content' button; 'Add enterprise data as knowledge from Dataverse' points to the '1 input' and '2 knowledges' buttons; 'Draft your prompt with Copilot or use prebuilt templates' points to the 'Get started with Copilot' section; 'Save to use in other agents, flows or apps' points to the 'Save' button; 'Define a specific output format (ex: JSON)' points to the 'Output: Text' dropdown; 'Instruct the agent to use deep reasoning for specific parts of the task' points to the 'Test' button; and 'Test the AI action output, directly in the flow of work' points to the 'Model response' section.

Choose a specific model (GPT-4o mini, GPT-4o, o1) that is best suited to run a given task

Provide specific instructions on how to perform individual tasks

Define input variables to process text, documents or images

Add enterprise data as knowledge from Dataverse

Draft your prompt with Copilot or use prebuilt templates

Save to use in other agents, flows or apps

Define a specific output format (ex: JSON)

Instruct the agent to use deep reasoning for specific parts of the task

Test the AI action output, directly in the flow of work

# Create REST APIs

Connect your agent with any external system to access available data

Upload the OpenAPI specification defining your API's functions and available actions

Add a detailed description to help the agent determine when to invoke the API

Select which type of authentication to use (Auth 2.0 or API)

The screenshot displays the Microsoft Copilot Studio interface. A central dialog box titled "Upload REST API specification" is open, showing a progress indicator and a list of steps: "Upload specification" (selected), "API plugin details", "Authentication", "Select Tools", "Configure tool", "Select tool parameters", "Review", and "Publish". The main content area of the dialog features a file upload field with the text "Drag and drop files here or [click to browse](#)" and "Max file size up to 5 MB". The background shows the Copilot Studio interface with a search bar and various tool options.

Choose and configure tools for your API and limit available actions you don't want users to execute

Use the Search bar to quickly find and add your REST API to add to your agent

# Model Context Protocol

Preview

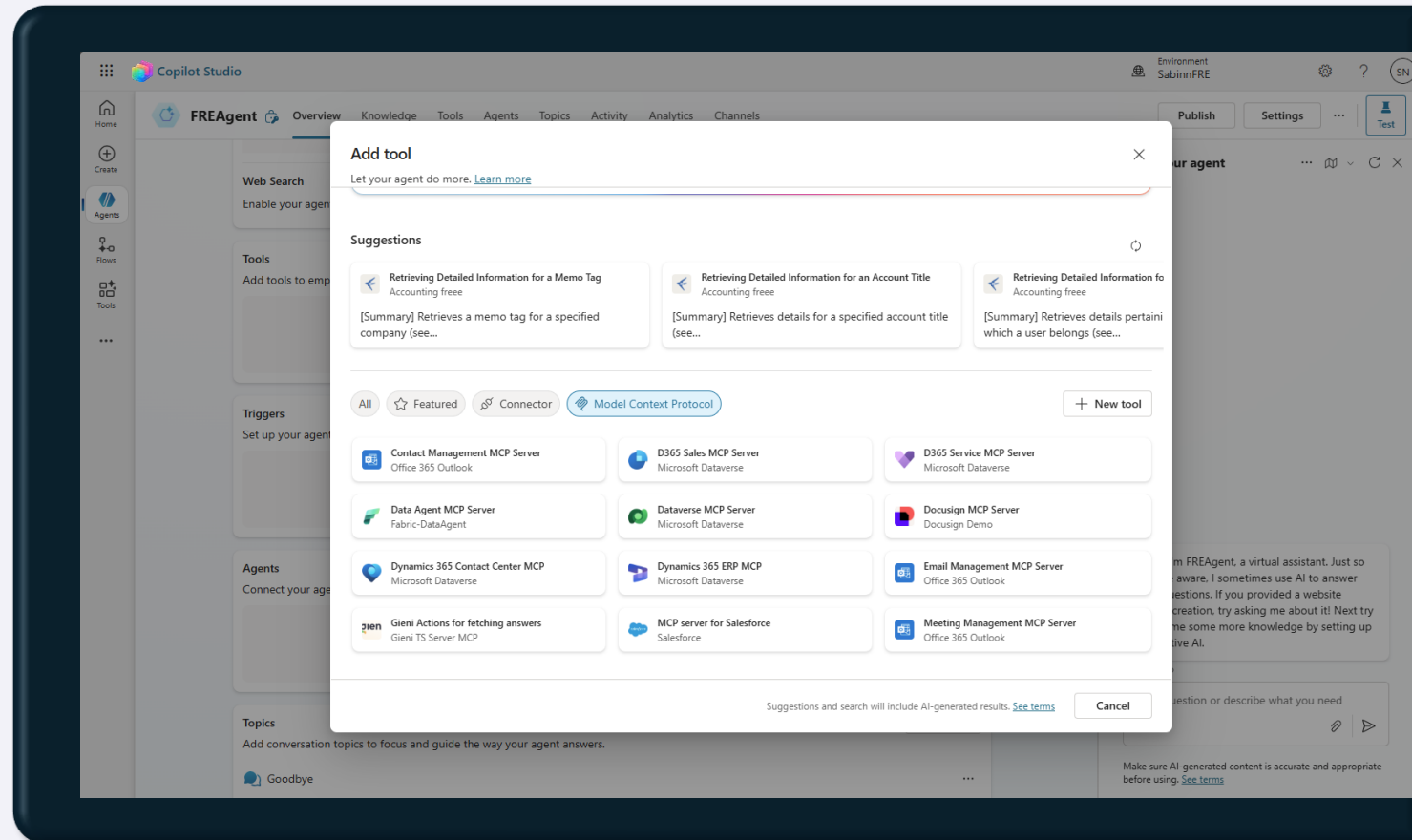
Connect agents to your existing knowledge servers and data sources directly

Connect your agents to MCP-enabled connectors, unlocking the latest actions and knowledge available for that server

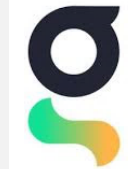
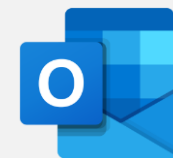
Access a marketplace of servers from the growing library of pre-built, MCP-enabled connectors or connect to your own existing server

Apply enterprise-grade security and controls to your connectors, including data loss prevention, authentication, and virtual networks

Gain enhanced analytics and tracing capabilities, offering better visibility into agent behavior and connector performance



Access a growing  
catalog of **MCP**  
connectors



# Code Interpreter

Enable agents to run code for advanced analytics and data visualization

## Run Python code

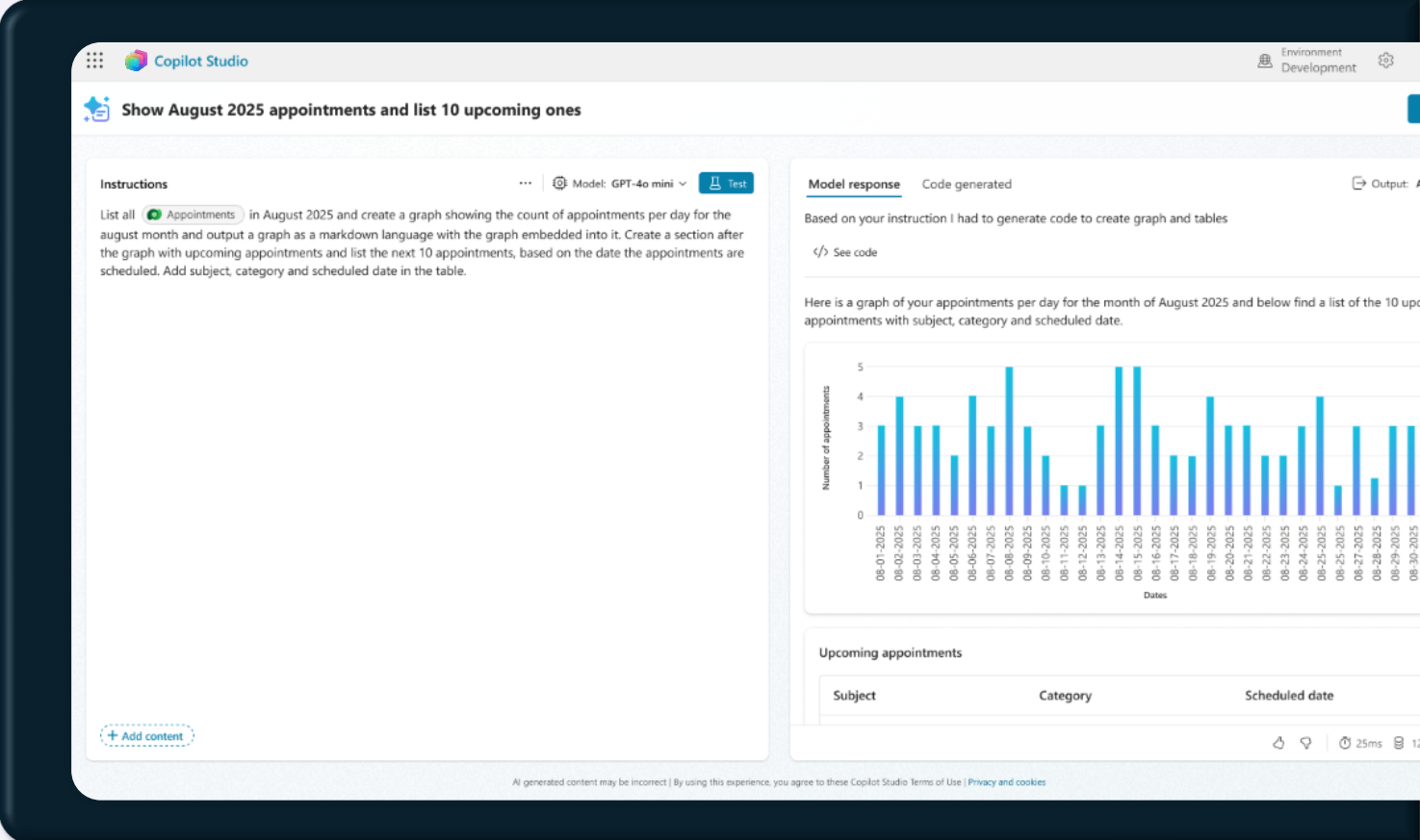
Now agents can write and run Python code from simple natural language prompts using advanced LLM models.

## Agent-led advanced analytics

Empower makers and users without advanced coding skills to offload data processing, advanced analytics and data viz generation to agents.

## Reuse code as components

Scale generated code to other agents to automate business processes that have advanced data analysis needs.



The screenshot shows the Copilot Studio interface with the following components:

- Header:** Copilot Studio logo and environment settings (Environment Development).
- Task:** "Show August 2025 appointments and list 10 upcoming ones".
- Instructions:** "List all `Appointments` in August 2025 and create a graph showing the count of appointments per day for the august month and output a graph as a markdown language with the graph embedded into it. Create a section after the graph with upcoming appointments and list the next 10 appointments, based on the date the appointments are scheduled. Add subject, category and scheduled date in the table." Model: GPT-4o mini.
- Model response:** "Based on your instruction I had to generate code to create graph and tables".
- Graph:** A bar chart titled "Number of appointments" vs "Dates" for August 2025. The y-axis ranges from 0 to 5. The x-axis shows dates from 08-01-2025 to 08-30-2025.
- Table:** "Upcoming appointments" table with columns: Subject, Category, Scheduled date.
- Footer:** "AI generated content may be incorrect | By using this experience, you agree to these Copilot Studio Terms of Use | Privacy and cookies".

# Choose your automation approach

## **Traditional automation**

Cloud flows

---

Desktop flows

## **Agentic automation**

Agents as the front door

---

Agent flows, computer use  
automation, and other tools  
inside of agents

# Choose your automation approach



## Power Automate

Leverage reusable and shareable automations for your processes



## Copilot Studio

Deploy AI agents to automate your processes

# Choose your automation approach



**Mix and match automation:** Agents at the edge, flows under the hood

# Design your own agent flows

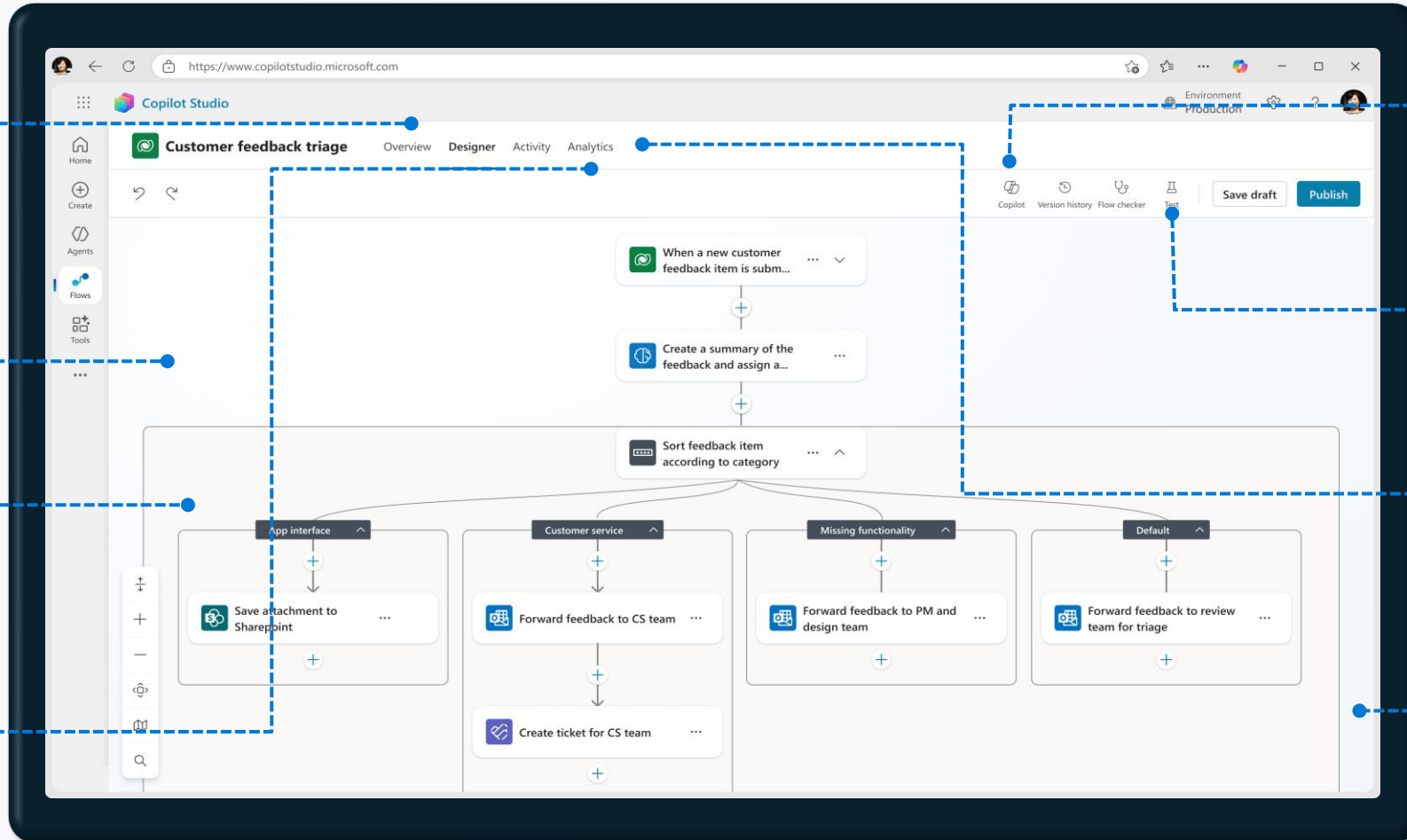
Design workflows, monitor their performance, and get actionable insights to improve your automation in one place

Get started quickly with a flow template

Use the graphical designer to manually build and edit your flow

Rapidly visually identify and correct errors in your flows

Analyze your flow's performance over time so you can improve it as needed



Easily create and edit flows using natural language – AI will do the heavy lifting for you

Test your flow before publishing

Calculate how much time and money your agent flow is saving your organization (preview)

Turn on express mode to allow your flow to execute faster so it can respond within the 2-minute failure window (preview)

# Keep humans in the loop with your agent flows

Flexible decision-making for complex, multi-stage approval workflows

Preview

Streamline approvals that require multiple levels of sign-off

Customize each stage to meet the needs for each level of stakeholders

Direct your agent to request information from humans for more oversight

Insert conditions between stages to add flexibility in decision-making like automatically approving or rejecting, skipping etc.

## Example use cases:



Insurance claims



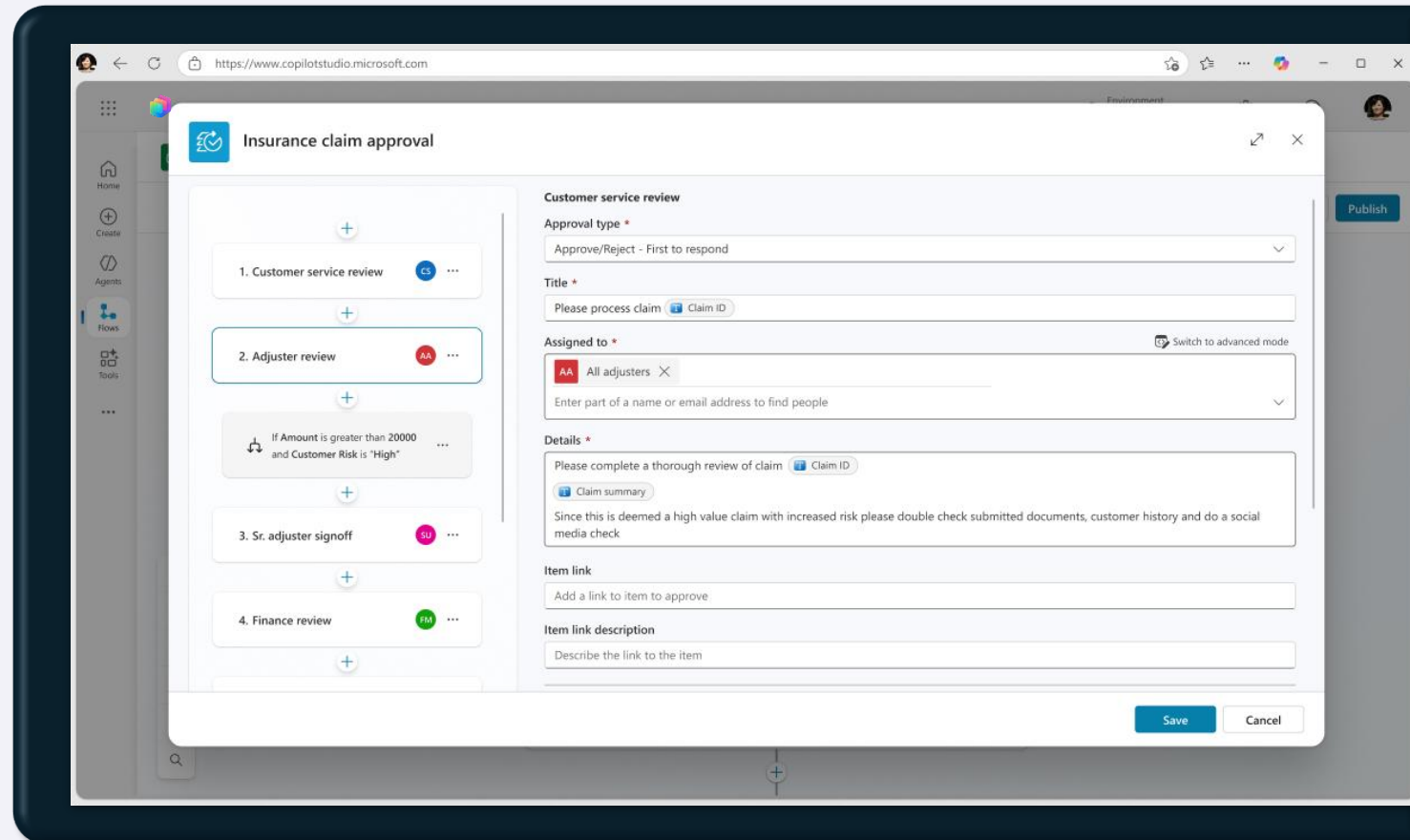
Legal document review



Financial services compliance



Supply chain quality control



# Computer use

Let your agent interact with and automate tasks on Windows computers

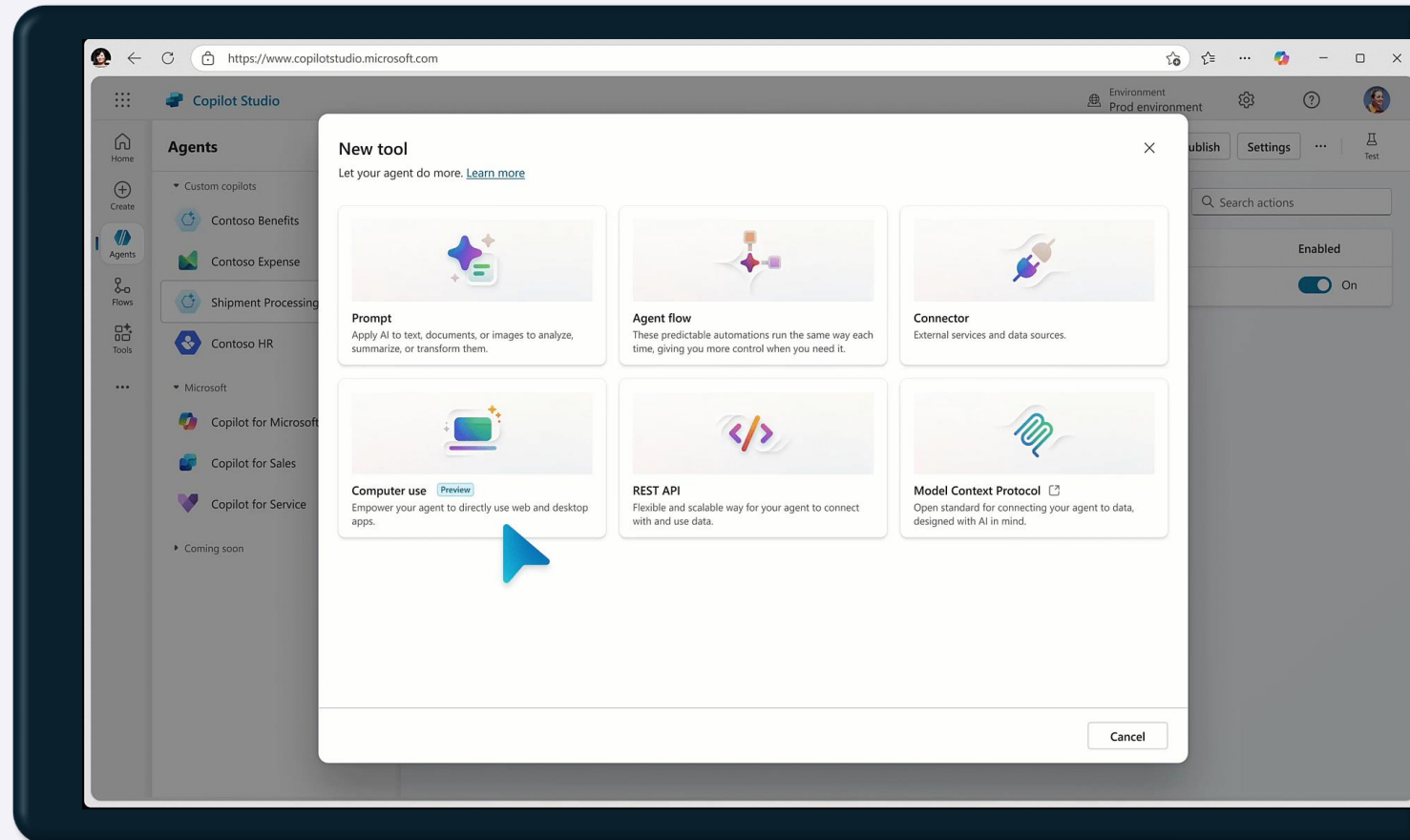
Preview

Give your agent the ability to read data, click buttons, choose menus and type by describing what you want it to do in natural language.

Build resilient UI automation that does not break when words, buttons, windows, or layouts change.

Get full visibility with real-time testing and activity history including captured screenshots and reasoning steps.

Deploy at scale on virtual machines hosted by you or by Microsoft to accelerate deployment, simplify management, and reduce costs.



# Powered by Foundry



Copilot Studio

Low-code managed environment for  
AI business process automation



Visual Studio / GitHub

Pro-code environment for  
commercial AI solutions



Microsoft Foundry

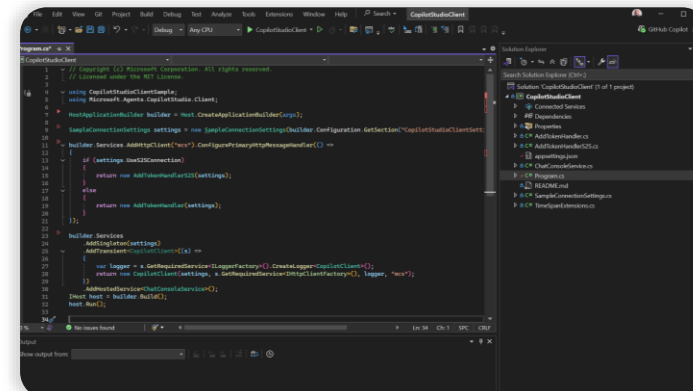
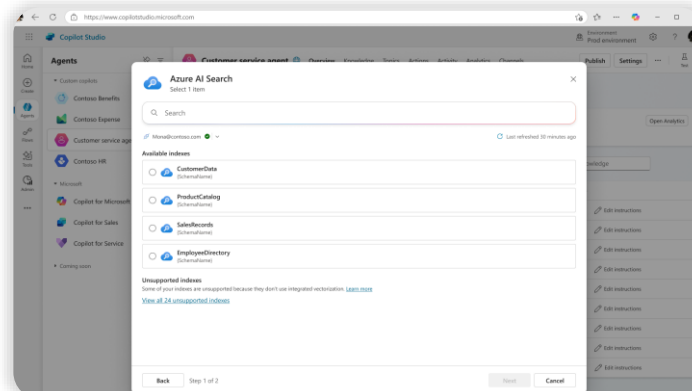
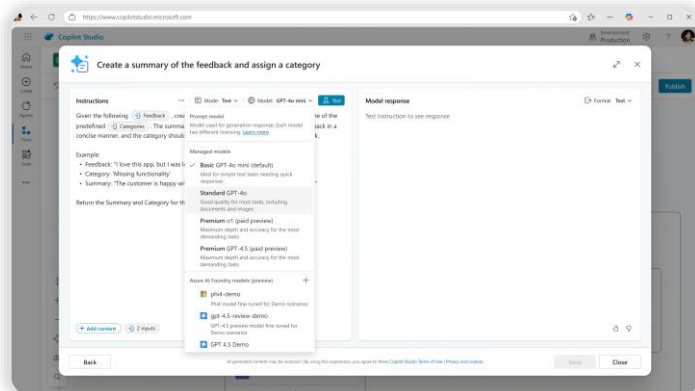
Comprehensive platform of models, agents, tools, and safeguards to design,  
customize, and manage AI applications and agents at scale



Microsoft Fabric

Complete data platform to accelerate AI innovation

# Foundry integration



## Bring your own model

Build agents by engaging in a conversational, natural, human-like experience in Copilot.

## Bring your own knowledge

Enhance your agents' RAG operations by utilizing vector indices of your unstructured data from Azure AI Search as a knowledge source

## Bring your own agent

Use Copilot Studio components in M365 Agents Toolkit and SDK to build pro-code agents with Microsoft 365 Copilot capabilities & deploy them to any of the 15+ channels enabled for Copilot Studio

# How Copilot Studio + Foundry works

## Multi-agent orchestration with enterprise context

Compose intelligent agents that collaborate across tasks, tools, and data boundaries

---

Enable agent-to-agent (A2A) communication for complex workflows  
(e.g., triage → summarize → act)

---

Ground agents in your enterprise graph—data, people, processes, and permissions

## Unified development and deployment

Build custom agents that act across systems and channels

---

Connect to Foundry to fine-tune, evaluate, and manage custom models

---

Seamlessly integrate APIs, plugins, and orchestration logic into agent behaviors

---

Have immediate access to the latest capabilities, models and tools

## Secure, scalable, and compliant by design

Agents inherit Microsoft 365's security, compliance, and identity controls

---

Govern agent lifecycle with telemetry, access policies, and usage analytics

---

Deploy across clouds and hybrid environments with Azure-native scalability and observability

# Edit agents in Visual Studio Code

Enhance the development experience of agents with the Copilot Studio extension for Visual Studio Code

The screenshot displays the Visual Studio Code interface with the Copilot Studio extension. The Explorer view on the left shows a project named 'COOKIE\_BAKER' with a 'Cookie Baker' folder containing a 'topics' subfolder. The 'ResetConversation.mcs.yml' file is selected and open in the editor. The code in the editor is a YAML configuration for an agent, showing properties like 'Name', 'kind', 'startBehavior', and 'beginDialog'. The 'beginDialog' section includes an 'OnSystemRedirect' dialog with 'main' ID and actions for sending activity, clearing variables, and canceling dialogs. The status bar at the bottom indicates 'Ln 1, Col 1 Spaces: 4 UTF-8 CRLF {} Microsoft Copilot Studio'.

View a list of all agents associated with your environment

Easily install the Copilot Studio extension

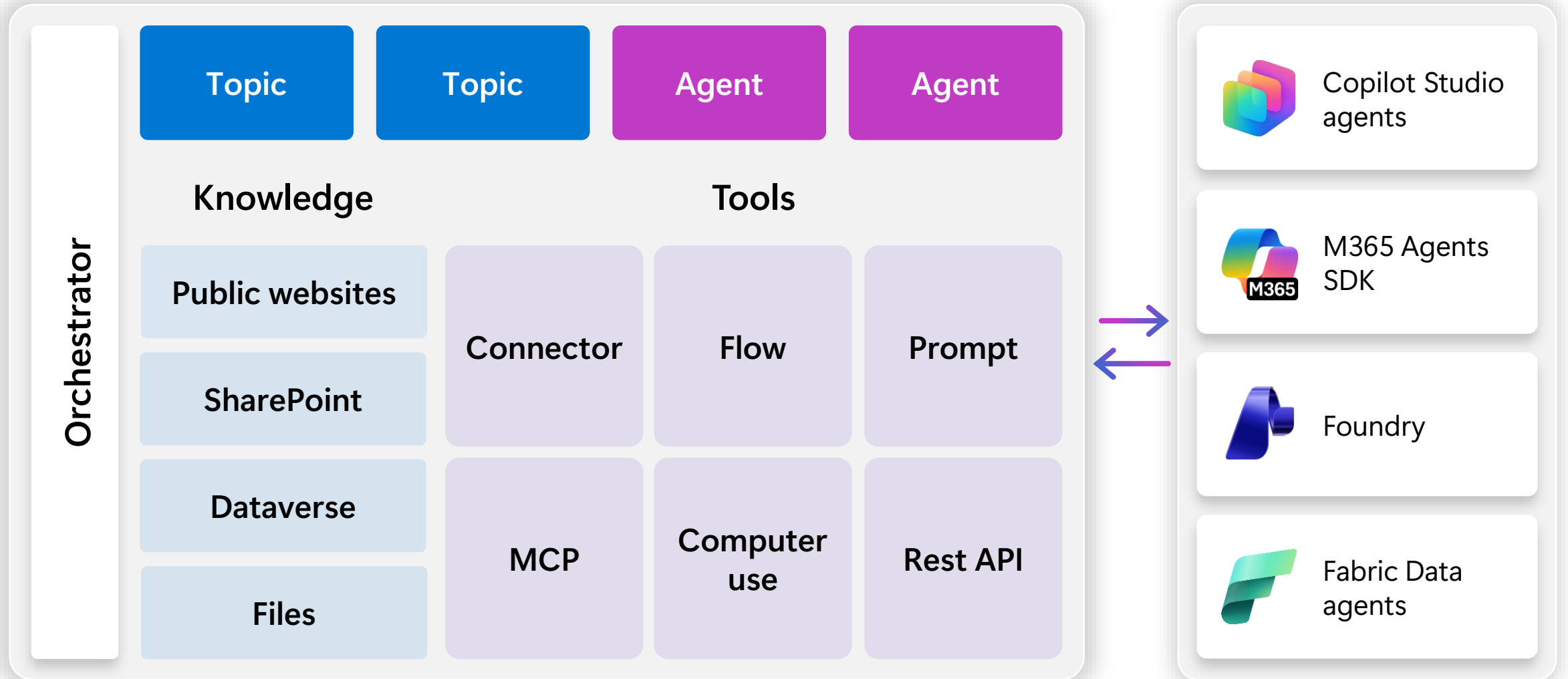
Push changes to save them directly to Copilot Studio

Live edit components such as knowledge sources, actions, topics and triggers

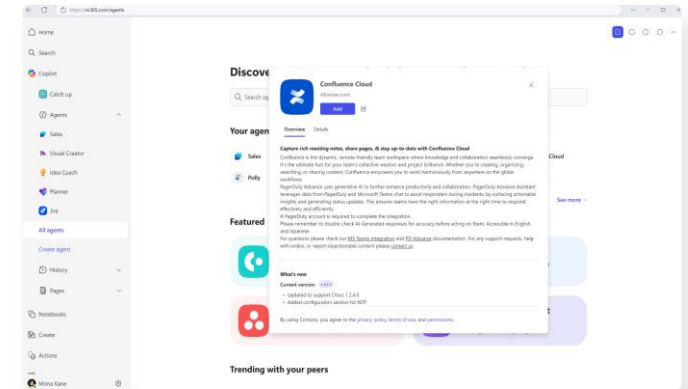
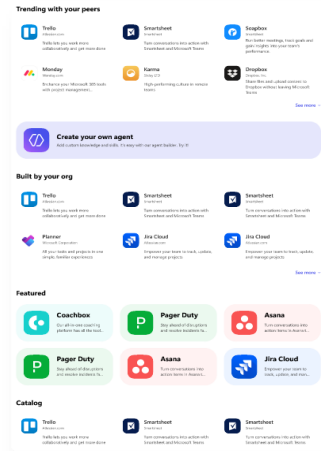
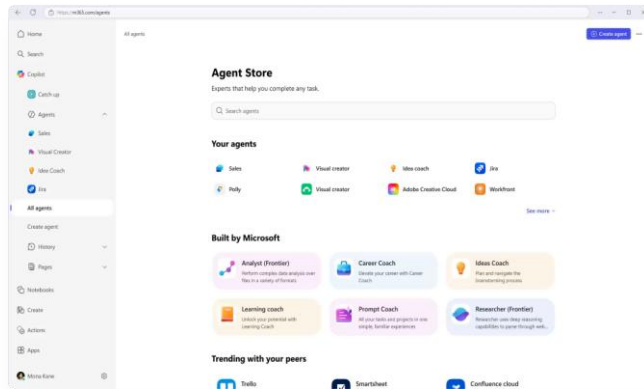
Supports IntelliSense code completion and guided tips



# Copilot Studio agent



# Agent Store



## Discover agents

Personalized experience on an integrated platform to discover agents from Microsoft, partners, and your own organization.

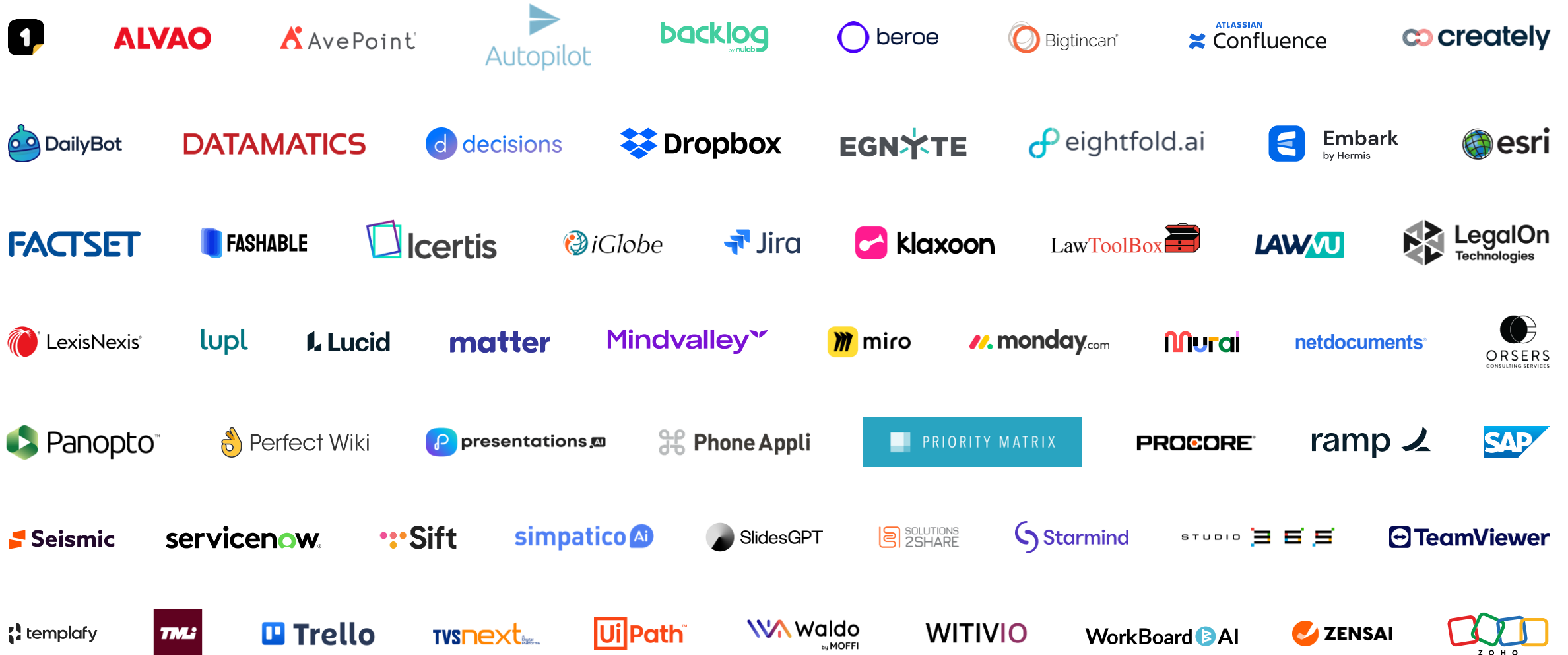
## Deploy quickly

Accelerate results with ready-to-deploy agents that help boost efficiency and enable smarter decisions.

## Admin control

Agents are validated for security, compliance, and performance, and IT retains full control and oversight.

# Trusted third-party agents available today



# Explore agents prebuilt for you

Choose from a variety of agents that are ready to deploy or customize further to fit your business needs

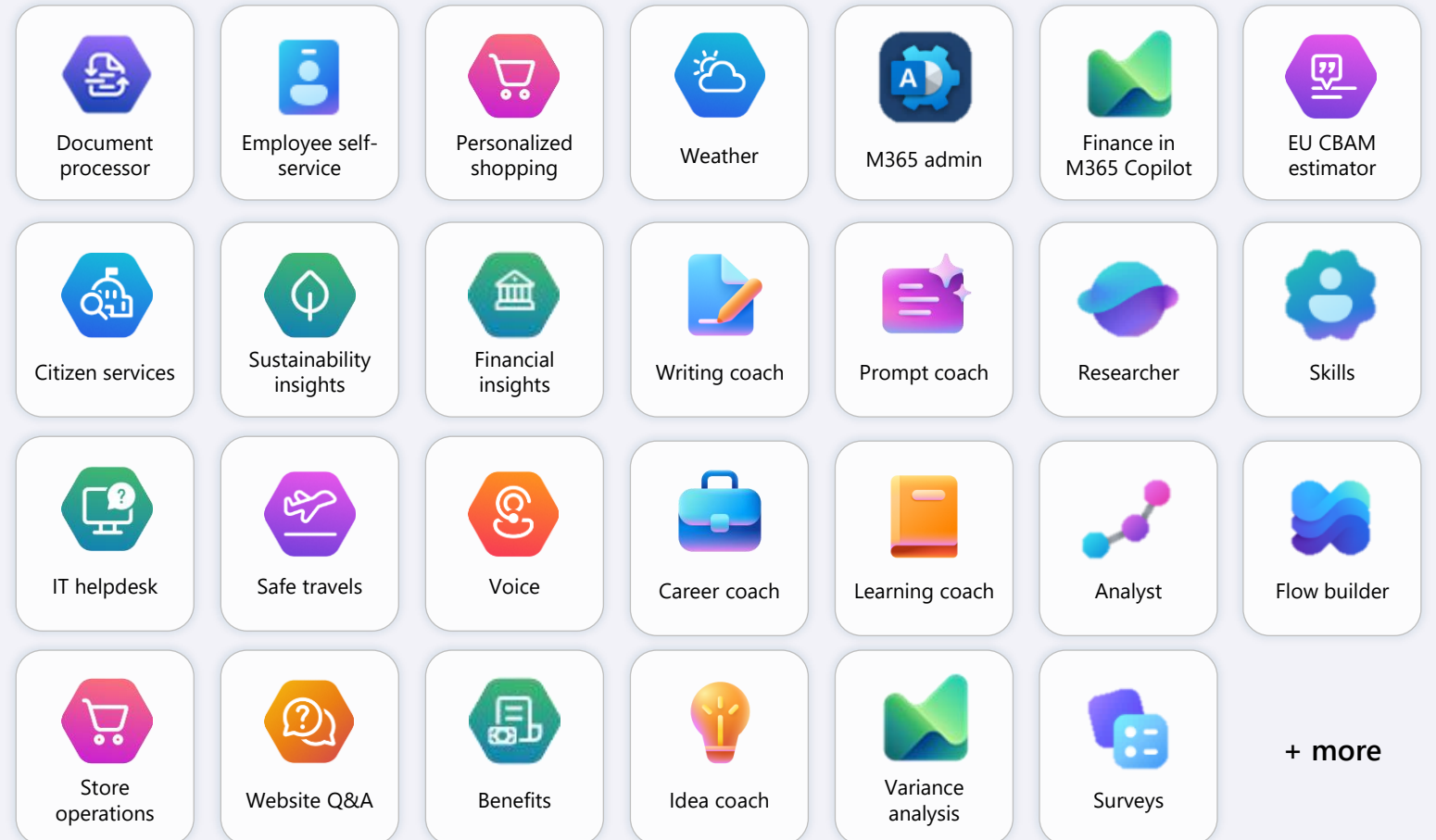
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## Managed agents

Publish a complete solution with built-in services that can be customized with add-ons

## Templates

Get started quickly with a tailored, preconfigured set of building blocks.



Public Preview

# Document Processor

An autonomous agent that reads, understands, and acts on your documents

Read



Capture Incoming Documents

Understand



Extract Insights with Gen AI

Act



Store Insights and Process

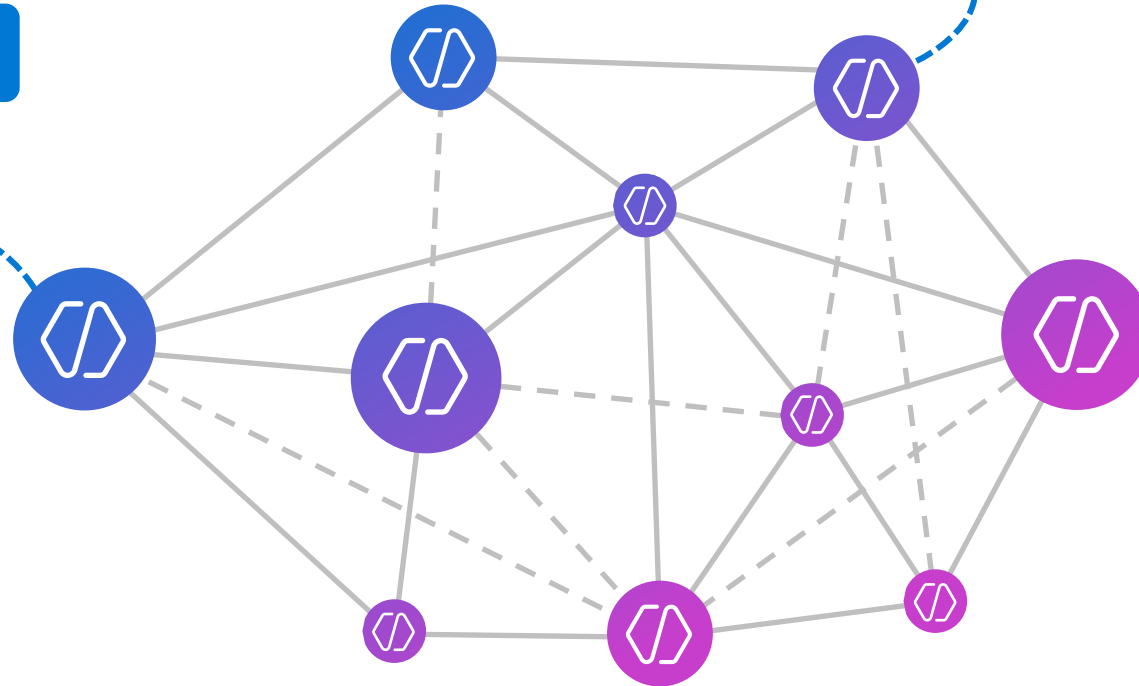
# Connect agents, regardless of where they're built

## Agents

Build with Copilot Studio

Use the Microsoft 365 Agents Toolkit to connect agents from AI services like:

- Microsoft Azure
- Microsoft Foundry
- Semantic Kernel
- Amazon Web Services
- Google Cloud Platform
- IBM Cloud
- OpenAI
- LangChain (Langflow)
- Agentforce
- MetaGPT
- Relevance AI
- Zapier Central
- Vertex AI
- Perplexity
- Claude
- Gemini



# Bring your own agents to Microsoft 365 Copilot

Turn your existing AI investments into powerful, native Microsoft 365 Copilot experiences—tailored to your workflows, your data, and your users



## Maximize ROI on AI investments

By bringing your own agent, you can reuse you've already built—no need to start over.



## Full Developer Control

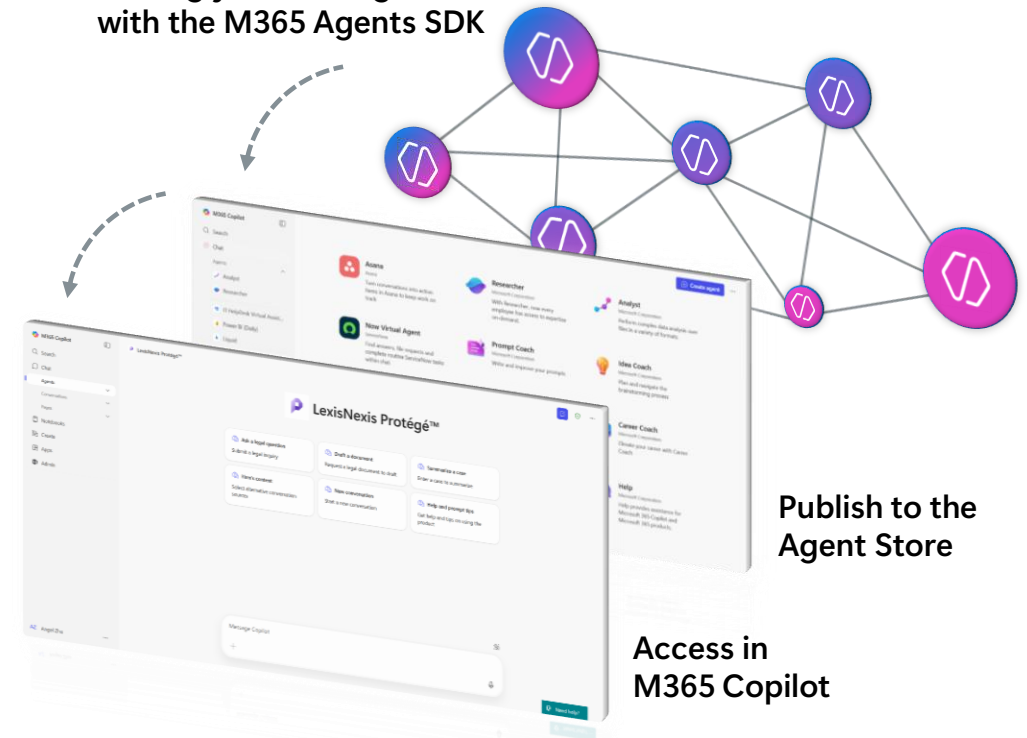
Define custom workflows, tools, knowledge, integrate APIs, and use proprietary or fine-tuned LLMs, all with enterprise-grade security and compliance in Microsoft 365 Copilot.



## Frictionless user experience

Agents feel like a natural part of Microsoft 365 Copilot—no training, no installs, Copilot-native experience

Bring your own agents  
with the M365 Agents SDK



Publish to the  
Agent Store

Access in  
M365 Copilot

# Bring your own agents to Microsoft 365 Copilot

Bring your own AI agents—built with your models, logic, and tools—into Microsoft 365 Copilot for a seamless, secure, and native experience that meets your unique business needs

**Full Developer Control:** Define workflows, integrate APIs, and use proprietary or fine-tuned LLMs.

**Asynchronous Capabilities:** Support for long-running tasks, proactive alerts, and background processing.

**Enterprise-Ready:** Built-in security, compliance, and deployment across Microsoft 365 Copilot and Teams.

**Unified Experience:** Agents appear natively in Copilot Chat via the Agent Store—no separate install needed.

**Pro-code ready:** Leverage Foundry and Visual Studio with the Microsoft 365 Agents Toolkit and SDK.





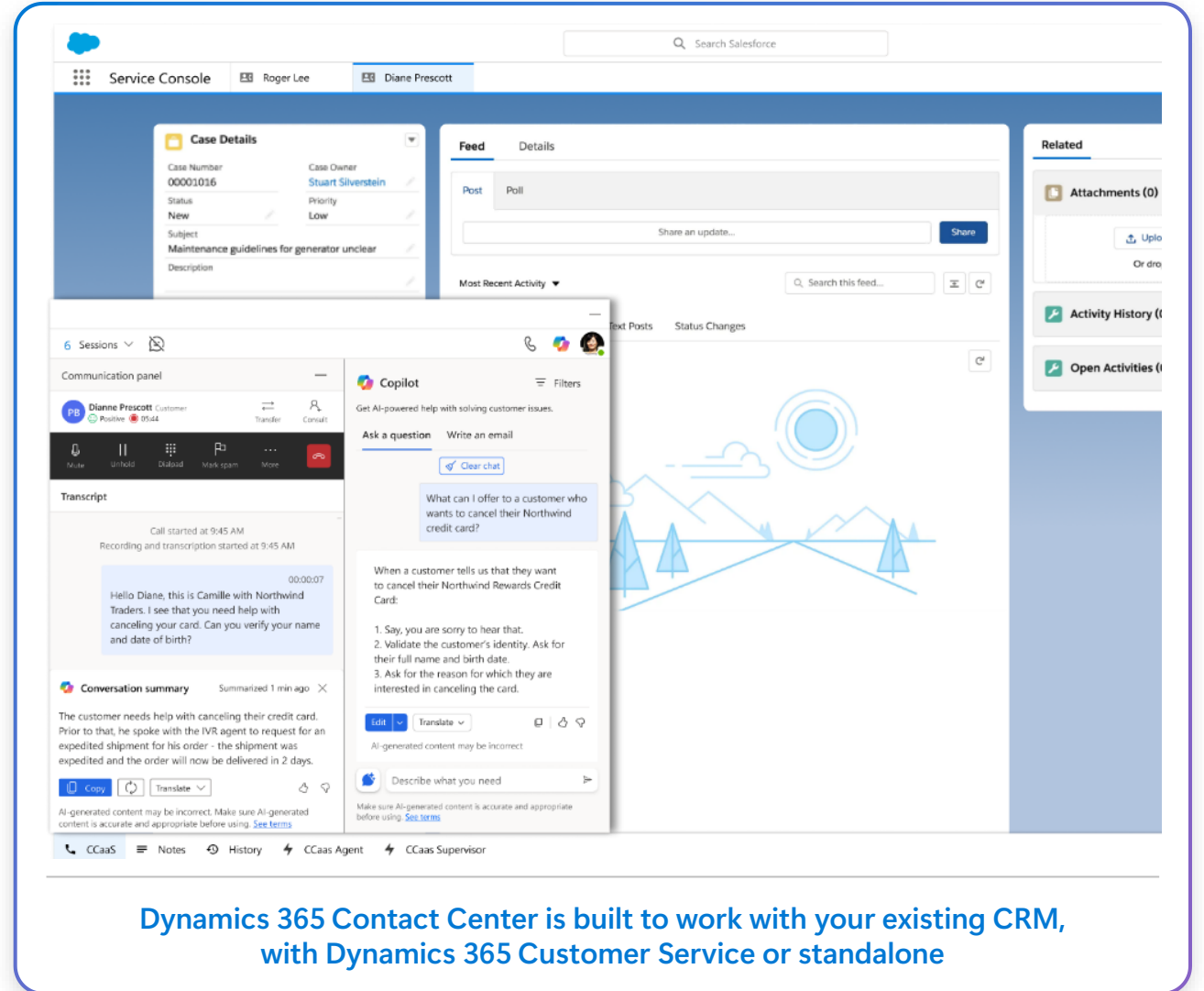
# Dynamics 365 Contact Center

Easily integrate custom AI agents built in Copilot Studio with Dynamics 365 Contact Center to deliver fast, personalized self-service for less

Enable hand-off from AI agents to live agents when more personalized human interactions are required

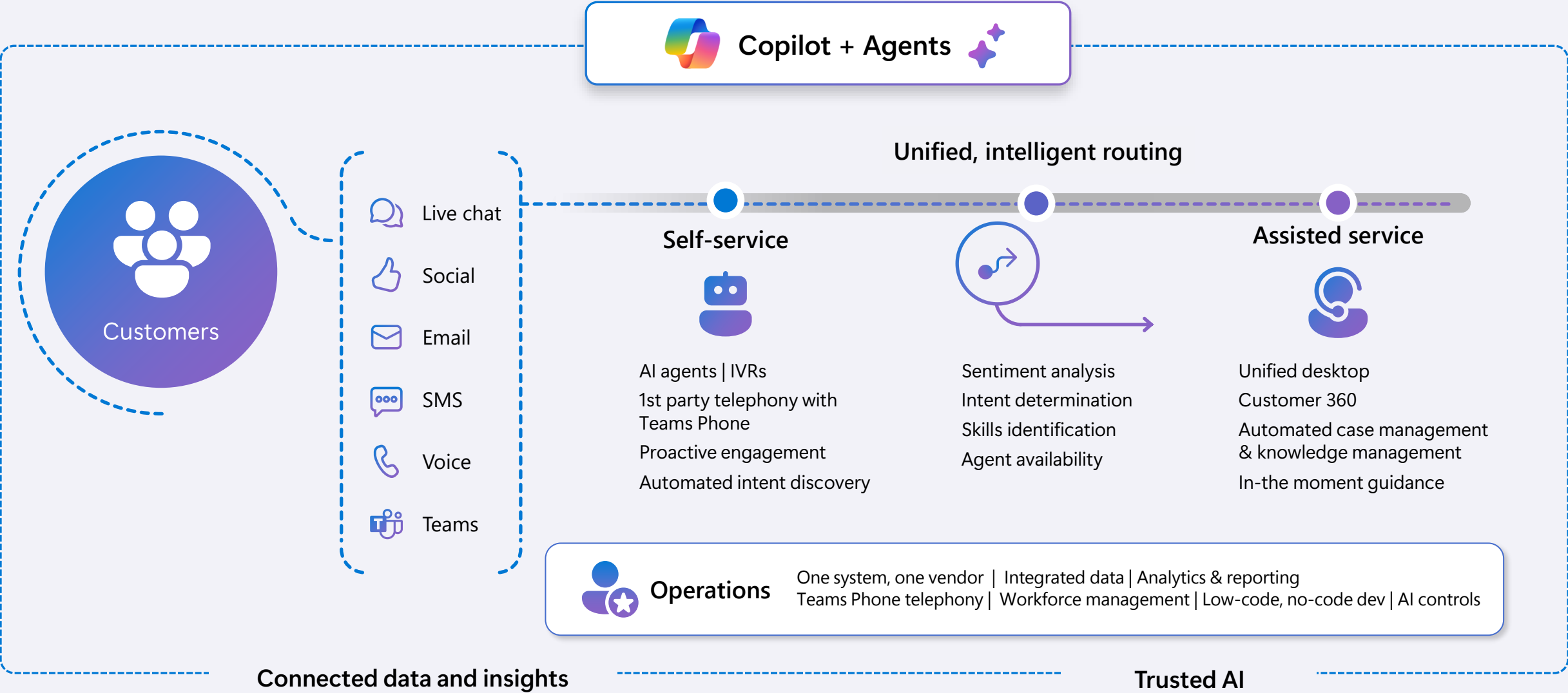
Selectively route incoming requests to agents based on context, complexity, and customer

Monitor agent conversations in real time through the supervisor dashboard



**Dynamics 365 Contact Center is built to work with your existing CRM, with Dynamics 365 Customer Service or standalone**

# A unified, composable Contact Center built for the AI era



# Optimize voice self-service with IVR



## Enhanced speech recognition accuracy

Powered by Nuance speech recognition technology, accuracy is boosted based on bot content to improve speech recognition accuracy for business scenarios



## Native DTMF authoring support

Single and multidigit DTMF recognition for menu building and collecting information from users



## Silence detection

Configure the silence detection timer, re-prompt, escalate or start custom flow



## Background noise resilience

Filter out background noise from end user to reduce unintended interruption and unrecognizable speech input



## Speech optimized authoring

Use SSML to fine tune the speech, test with speech or DTMF



## Barge-in

Allow users to interrupt the flow at any time with speech or DTMF



## Long running operation latency message

Play a loop message when the backend operations are running long



## Dialog Experiences

Use of Anaphora, topic switching, multi-entities enables a natural conversational experience

# Continually update and improve your AI agents

## Monitor Usage & Feedback



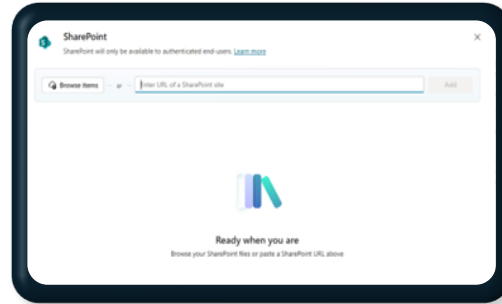
### Listen to your users

1. Track how users interact with the agent (queries, drop-offs, satisfaction scores).
2. Collect qualitative feedback to identify pain points and unmet needs.
3. Centralize telemetry using Power BI Dashboards\*

Analytics in Copilot Studio



## Retrain with Fresh Relevant Data



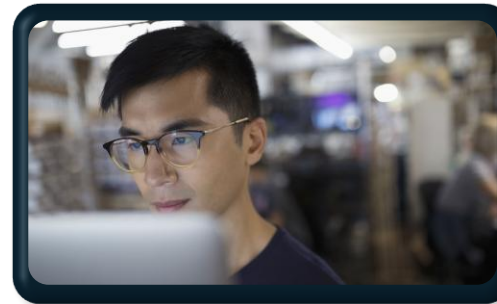
### Feed it fresh data

1. Regularly update training datasets with new content, FAQs, and user scenarios.
2. Include edge cases and diverse inputs to improve robustness and inclusivity.

Agent Building Tools



## Human-in-the-loop agent evaluation



### Keep humans in the loop

1. Conduct periodic reviews with subject matter experts to assess accuracy and tone.
2. Use A/B testing to compare new versions and refine responses.

Human



## Continuous Learning Loops



### Build a learning loop

1. Set up pipelines for automated improvement (e.g., fine-tuning, prompt optimization).
2. Integrate learnings from user behavior, business changes, and evolving language.

Azure DevOps

# Calculate how much you've saved your org

Use the built-in savings calculator to estimate your business impact



## Calculate savings

Calculate time or cost savings compared to different methods for each agent run and/or tool used



## Estimate impact

Estimate an agent's business impact, identify and prioritize successful agents, and track return on investment (ROI) over time

### Savings ⓘ

Time ⓘ

387 hrs ↑ 5%

Cost ⓘ

\$12,771 ↑ 8%

### Savings

#### Get contacts from CRM

Use this tool to get contacts from the CRM

Time

13,013 hrs ↑ 60%

#### Get leads from CRM

Use this tool to get leads from the CRM

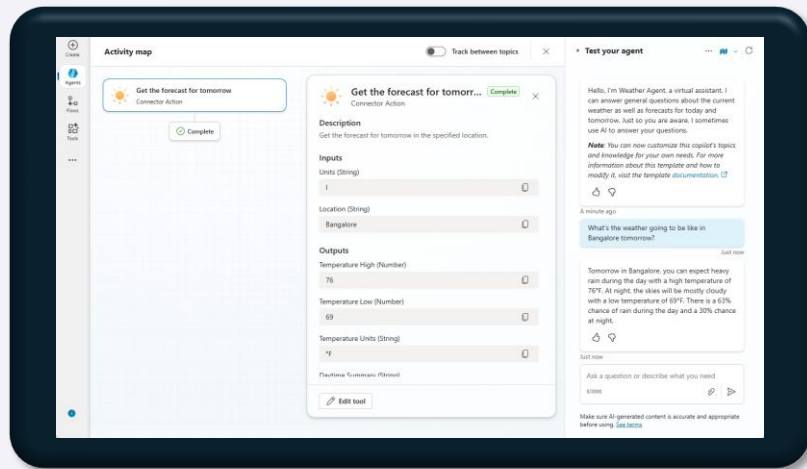
Time

490 hrs ↓ 93%

# Easily keep track of your agent's activity

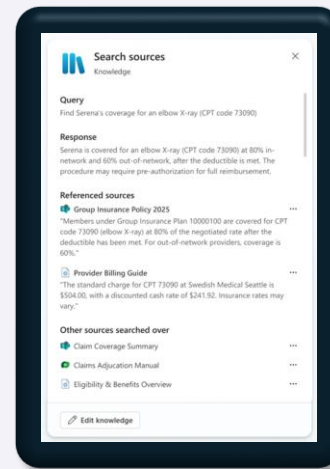
Review real-time and historical records of your agent's sessions to ensure your agent is meeting your goals

## Activity map



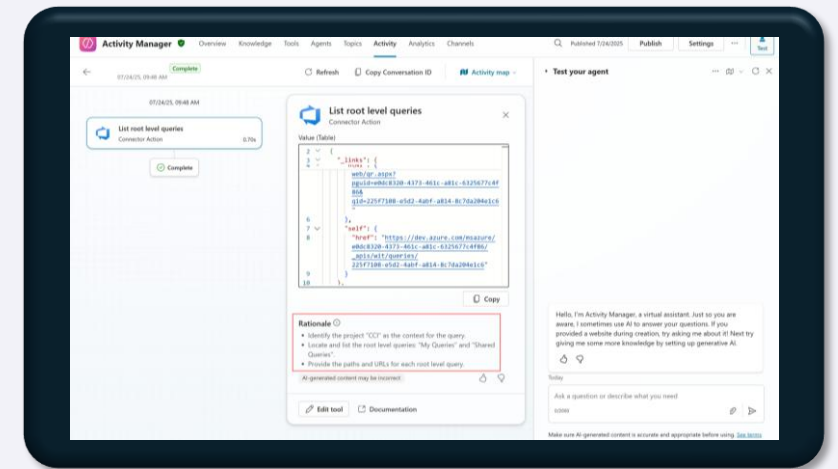
Test your agent's input and outputs and identify errors with a live visual flow diagram.

## Details



Select individual nodes to see details on the inputs, decision and outputs for that activity.

## Rationale



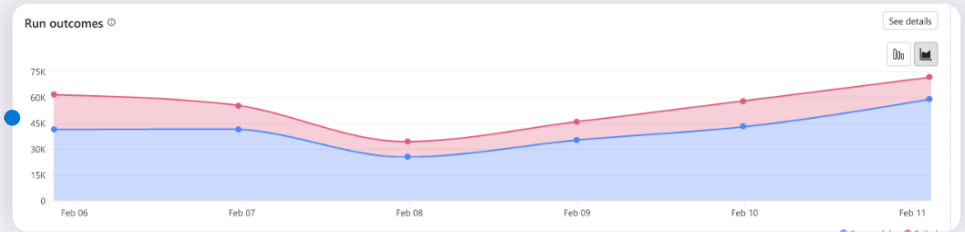
Quickly troubleshoot by reviewing auto-generated explanations for why your agent decided to call a particular tool or fill in parameters.

# Analyze autonomous agent performance

Review how your agent is performing and identify which areas need improvement

## Run outcomes

Knowing the end result of a session started by a trigger helps you begin to identify where your agent is succeeding and where it needs improvement.



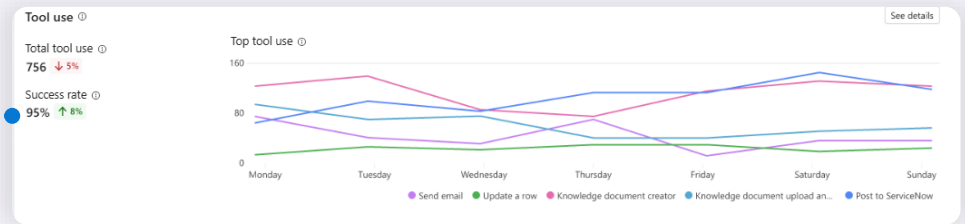
## Trigger use

Seeing which triggers are used and how often helps you understand what your agent is doing and why.



## Tool use

Learning how often tools are used and how often they succeed can help you understand if those tools are useful and successful.



## Knowledge source use

Learning how often individual knowledge sources are used and how often the agent returned errors.





# Copilot Studio licensing

Copilot Studio usage burns "Copilot Credits"

Full feature parity across Copilot Credit pack and metered offering

---

Burn rate parity across Copilot Credit pack and metered offering

---

Leverage your existing Azure commitments (MACC)

## Copilot Credit packs

- ✓ Tenant-wide credit packs
- ✓ 25,000 Copilot Credits / month
- ✓ \$200 per pack / month

## Pay-as-you-go

- ✓ New PAYGO meter
- ✓ \$0.01 / Copilot Credit
- ✓ Can decrement MACC



# Copilot Studio agent usage estimator

## Estimate your Copilot Credit consumption

Preview

Forecasts Copilot Credit consumption using data driven trends and assumptions

Customizes estimates based on licensing options and feature usage

Accessible from within Copilot Studio, Power Platform admin center, and public website

[aka.ms/copilotstudioestimator](https://aka.ms/copilotstudioestimator)

**Copilot Studio agent usage estimator (preview)**

Use this estimator to forecast your agent's message volume. Select from licensing options, agent types, and the features your agent leverages to respond to your end users. See the message consumption impact based on these selections. This provides a monthly message estimate for a single agent and makes no guarantees of final costs. This isn't a pricing calculator, so we can't provide total costs or make any definite forecasts around your monthly expenses.

1 Message = \$.01  
Go [here](#) to convert to your currency.

**Estimator type**  
Configure monthly agent message estimation in two ways

An estimate based on common telemetry data and assumptions

An estimate based on manual entries for my agent

**Agent traffic**  
Agent traffic quantifies the activity an agent supports by assessing the number of end users accessing the agent and their monthly engagement frequency

How many users? \*

On average, how many times per month will your users interact with your agent?

**Agent type**  
Agent type specifies whether the agent is deployed internally for employee interactions or externally for customer and partner conversations. Deployment location impacts usage trends, aiding in accurate consumption forecasting. [Learn more](#)

What is your agent type?

Employee-facing agent  Customer or partner-facing agent

**Agent orchestration**  
Orchestration involves managing and coordinating an agent's capabilities and actions to effectively respond to user queries and perform tasks. [Learn more](#)

What type of orchestration will you require?

Generative  Classic

**Agent knowledge**  
Knowledge sources enable agents to provide relevant information and insights. Published agents use configured knowledge sources to ground their responses. [Learn more](#)

**Total estimated messages**

**Messages driven by knowledge**

- Messages consumed for tenant graph grounding (10 messages) + generative answers (2 messages)
- Messages consumed for non-tenant graph grounding (2 messages): Dataverse, web, files

**Messages driven by actions and topics**

- Number of messages that charge for actions and topics
- Number of messages that charge for agent flows

**Messages driven by agent autonomous triggers**

**Messages driven by optional modifiers**

- Basic GPT-4o mini**  
1 message per every 10 responses
- Standard GPT-4o**  
15 messages per every 10 responses
- Premium GPT-o1**  
150 messages per every 10 responses

## Manage agent costs

# Track cost to departments and forecasting usage



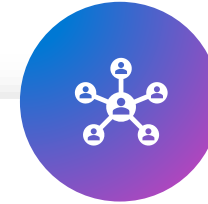
Link billing policies to  
PAYGO & security  
groups



Allocate prepaid  
capacity per  
environment/BU



Set budgets & alerts  
for cost center  
chargeback



Utilize departmental  
billing to build ROI  
analysis

Departmental Billing & Budget Controls

# Balancing Governance and Innovation



## Agent Creator/Maker



How can I **build a conversational agent** that will answer on my behalf?



How can I build agents that can **drive efficiency and save efforts and costs** for our enterprise?



## CISO



How can I understand all my **data security risks**?



How can I **discover** all agents and **protect my data** from external threats?



How can I ensure agents have the right access to data and **prevent data exfiltration**?



How can I **stay compliant with regulations**?



## CIO



How can I ensure that solutions people are building **follow guidelines**?



How can I gain **visibility** to what is getting used?



How can I get **experts to review agents** before they get shared broadly?



How can I drive **cost efficiency and ROI**?

# Agent Controls Model



← Data protection, agent sharing & usage limits, and reporting & cost management →

# Zoned security, governance, and operations



	Zone 1	Zone 2	Zone 3
Purpose	En-user agent creation (DIY) for personal use and experimentation with safe defaults	Team or Department Agents in the partnered DIY zone require formal assistance and oversight from a DIY coach, but are built by trained citizen developers	Large, potentially risky agents in the professional development zone are reserved for pro dev & IT-led development only
Secure	<ul style="list-style-type: none"> <li>Only M365 and Power Platform Connectors</li> <li>Agents run in user's context only</li> </ul>	<ul style="list-style-type: none"> <li>Zone specific Advanced Connector policies in Power Platform Admin Center</li> <li>Teams share access to approved Data sources                             <ul style="list-style-type: none"> <li>Scale with Environment groups + rules</li> </ul> </li> </ul>	Zone specific Advanced Connector policies in Power Platform Admin Center + Purview
Govern	Personal use agents in Developer Environments. Environment routing keeps agents isolated to maker. Sharing disabled and scoped to just Maker use	<ul style="list-style-type: none"> <li>Admin approved environments provisioning                             <ul style="list-style-type: none"> <li>Scoped roles and sharing policies</li> <li>ALM Pipelines for agent versioning</li> <li>IT-admin approval to publish agents</li> </ul> </li> </ul>	Manage sharing via Integrated Apps in Microsoft Admin Center
Monitor	Review agent usage in Copilot Hub in Power Platform	Track agent usage and security posture in Microsoft Admin Center, Microsoft Purview, and Power Platform Admin Center	

# Compliance certifications



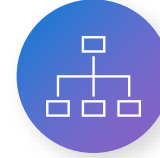
Health Insurance  
Portability and  
Accountability Act  
**(HIPAA)** coverage



Health Information Trust  
Alliance **(HITRUST)**  
Common Security  
Framework **(CSF)**



Federal Risk and  
Authorization  
Management Program  
**(FedRAMP)**



System and Organization  
Controls **(SOC)**



Various International  
Organization for  
Standardization **(ISO)**  
certifications



Payment Card Industry  
**(PCI)** Data Security  
Standard **(DSS)**



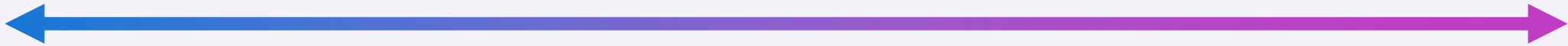
The Cloud Security  
Alliance **(CSA)** Security  
Trust Assurance and Risk  
**(STAR)**



United Kingdom  
Government Cloud  
**(G-Cloud)**

[Learn more >](#)

# Manage your Copilot Studio agent end-to-end



## Power Platform Admin Center

Manage the maker experience  
in Copilot Studio

Control how agents are built, configured  
and improved after publishing



## A365

Manage the published agent

Oversee access, compliance and security  
after deployment



# Microsoft Agent 365

## Agent 365 SDK & Agent ID



### Agent productivity



Microsoft applications

Agent profile

Agent memory

Agent config.

Graph



### Agent observability, security & governance



Comprehensive dashboards

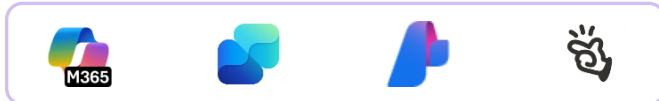
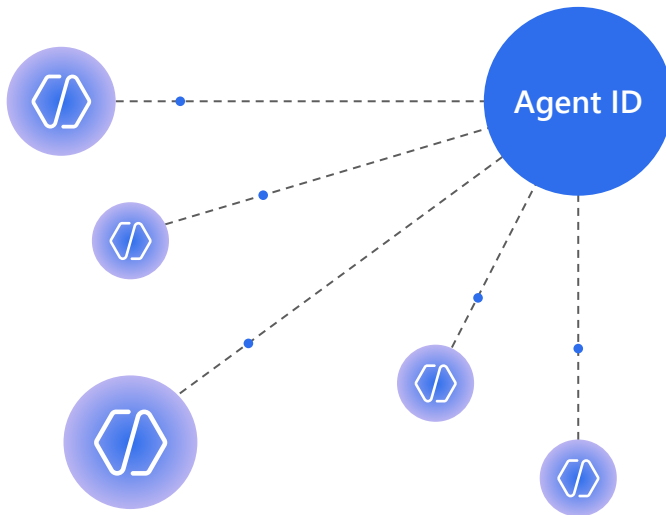
Audit logs

Integrated security solutions

# Agent 365

From secure control to scaled impact

Bring agents under management



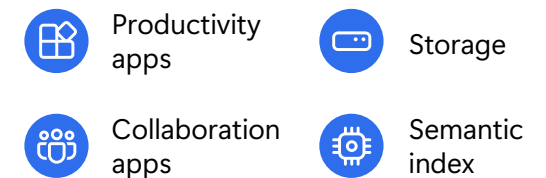
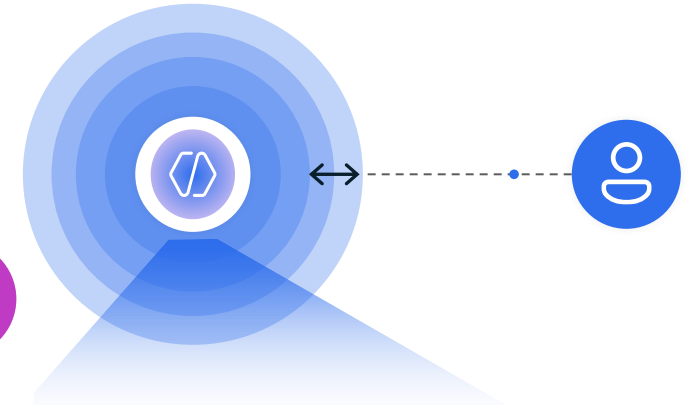
Any agent across different agent builder platforms

Securely roll-out and manage



Microsoft 365 admin center

Enable human-agent workflows



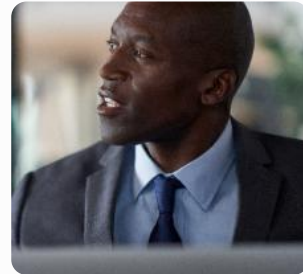
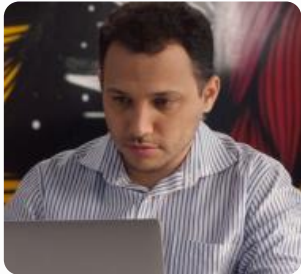
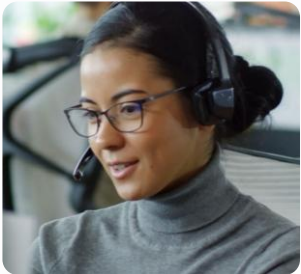
# Copilot Studio's global footprint

## 23 languages & growing

Chinese (Simplified)	Italian
Chinese (Traditional)	Japanese
Czech	Korean
Danish	Norwegian
Dutch	Polish
English	Portuguese (Brazilian)
Finnish	Russian
French	Spanish
German	Swedish
Greek	Thai
Hindi	Turkish
Indonesian	

32 data centers worldwide

# Unlocking transformation by function



Customer Service	Sales	Finance	Marketing	HR	Legal	IT
Self-help	Customer self-service	Quote to cash	Customer insights & strategy	Employee engagement	Regulatory & compliance mgmt.	Data management
Support assignment	Lead generation	Record to report	Demand generation	Recruiting	Contracting	Software mgmt. & development
Issue diagnosis	Customer engagement	Tax & treasury	Content creation	HR admin & payroll	Risk management	Device management
Problem resolution	Negotiations & closing	Planning & analysis	Campaign execution	Compensation & benefits	Litigation	IT operations
Continuous improvement	Post-sale follow-up & upsell	Risk management and compliance	Predictive analysis	Learning & development	Consultation	Security operations
	Sales analysis & forecasting	Procure-to-pay	Personalization	Talent management	Intellectual property	Change management & user adoption
			Sales enablement & recommendation	HR strategy & planning	Advisory services	

# Unlocking transformation by industry



## Public sector

- Citizen Q&A
- Upskilling Recommendation
- Campus Support Assistant
- Document Processing & Routing
- Benefit Eligibility

## Retail

- Return Fraud Detection
- Personalized Promotion
- Price, Promotion & Markdown Optimization
- Customer Lifetime Value Prediction
- Inventory Replenishment Planning

## Finance

- Customer Inquiry
- Internal Policy Q&A
- Transaction Dispute
- Legal Contract Generation & Compliance Check
- Claim Settlement

## Manufacturing

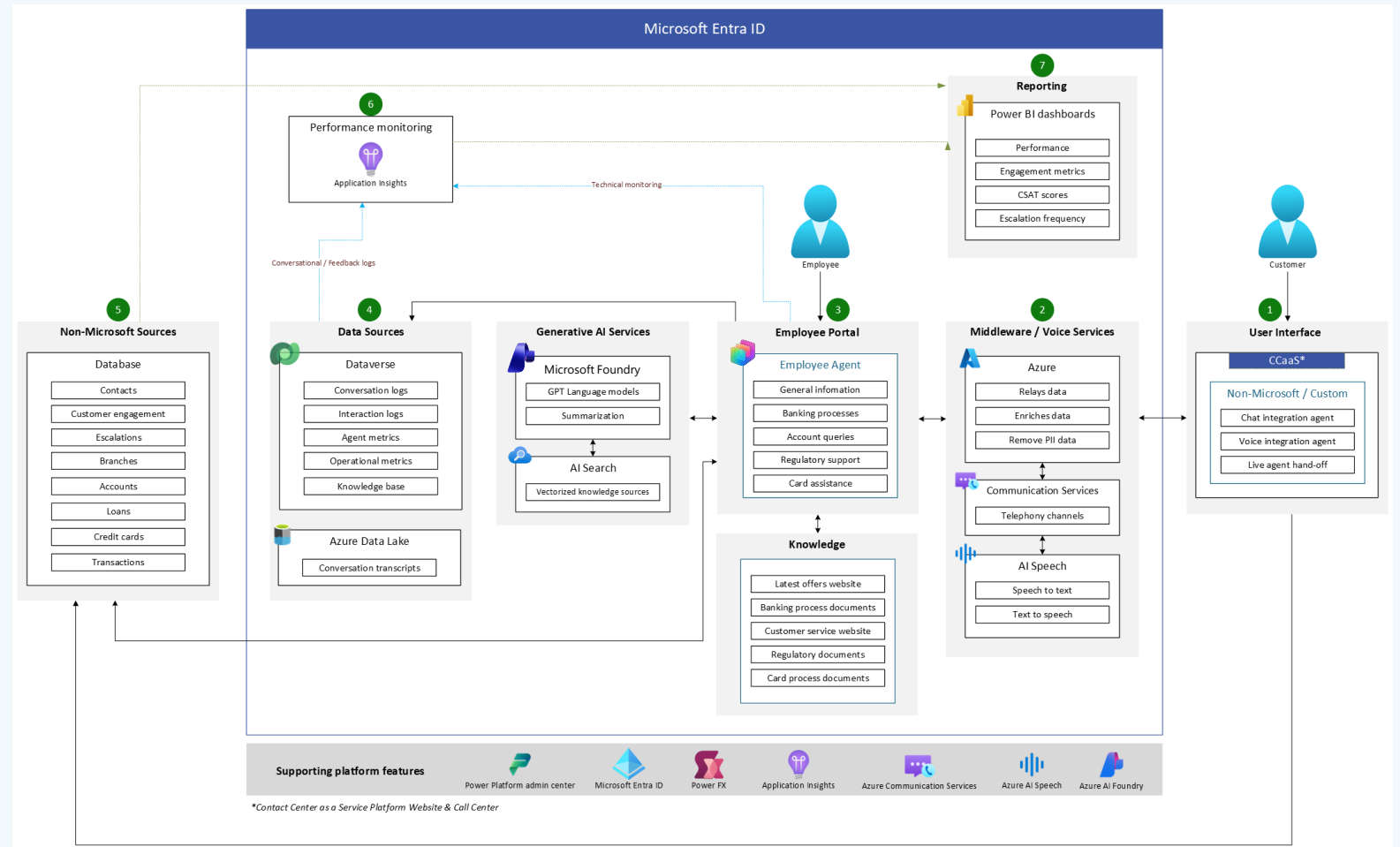
- Production Schedule Optimizer
- Shift Planning Optimizer
- Manufacturing Inspector
- Maintenance Prediction
- Visual Work Instruction

+ more

# Custom contact center solution

In this solution, a national banking company uses a non-Microsoft contact center and data sources with Copilot Studio, Microsoft Dataverse, and Azure Data Lake Storage to enhance employee efficiency and improve customer experiences.

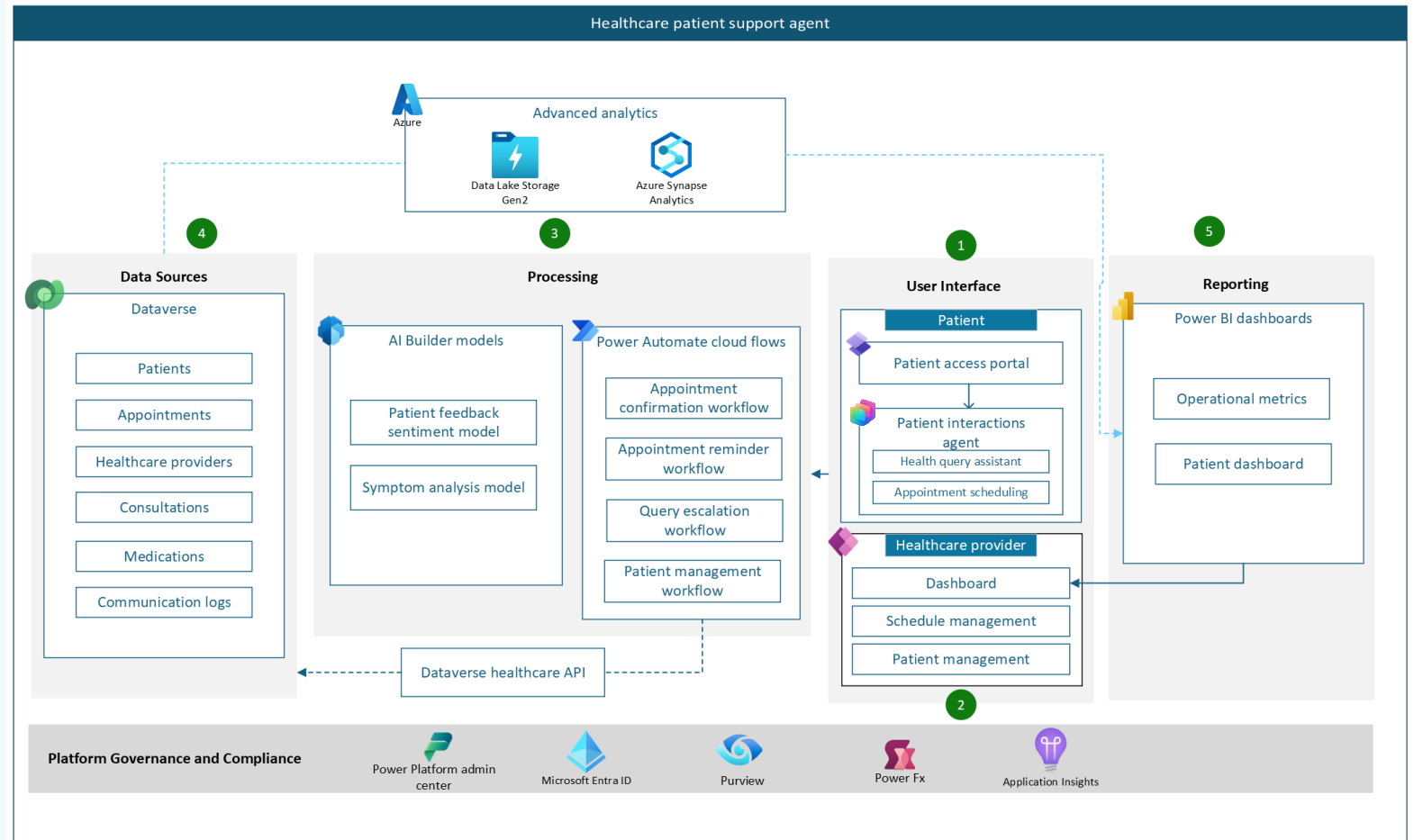
[Learn more >](#)



# Healthcare patient support agent

In this solution, a healthcare provider uses Copilot Studio, Dataverse, Azure Data Lake, Azure Synapse Analytics, and AI-driven tools to create an efficient, integrated system that enhances patient satisfaction and operational efficiency.

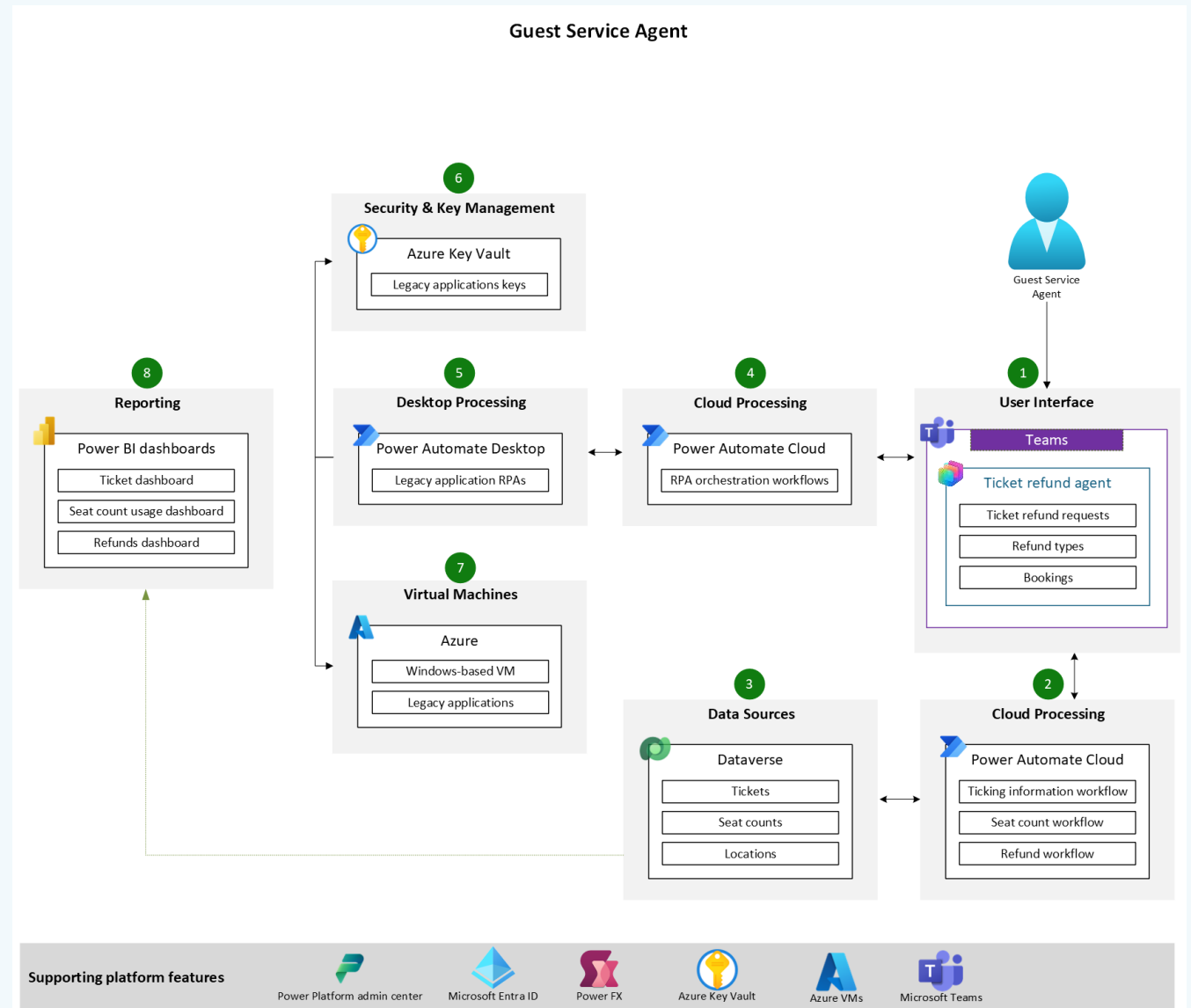
[Learn more >](#)



# Ticket management system

In this solution, a cinema company uses Copilot Studio, Teams, Dataverse, Azure Virtual Machines, and Power BI, to create a guest support agent that improves customer and employee experiences.

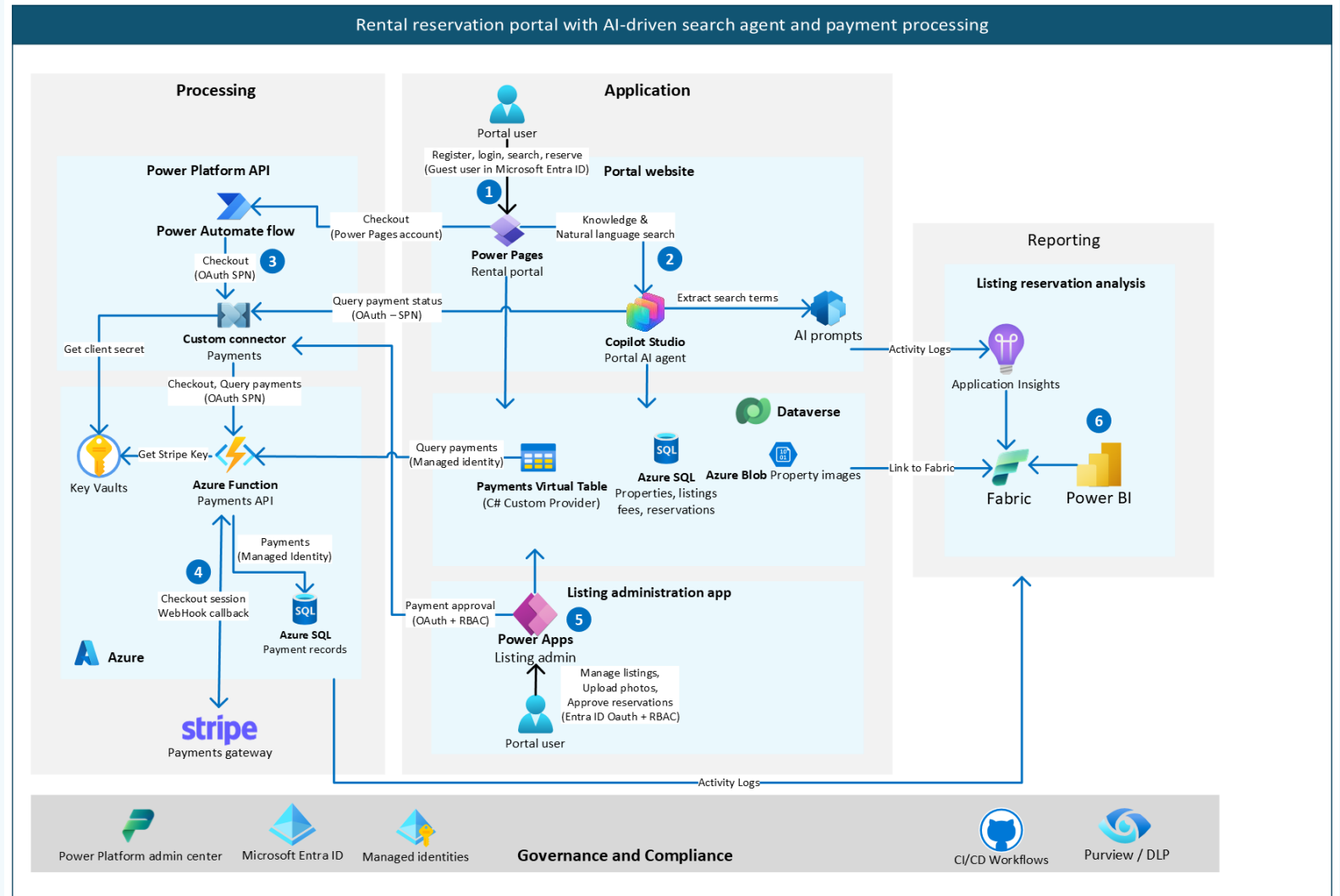
[Learn more >](#)



# Property reservation portal

In this solution, a rental property company uses Copilot Studio, Power Platform and Azure components to create a rental property portal that provides AI-driven search capabilities and seamless payment processing.

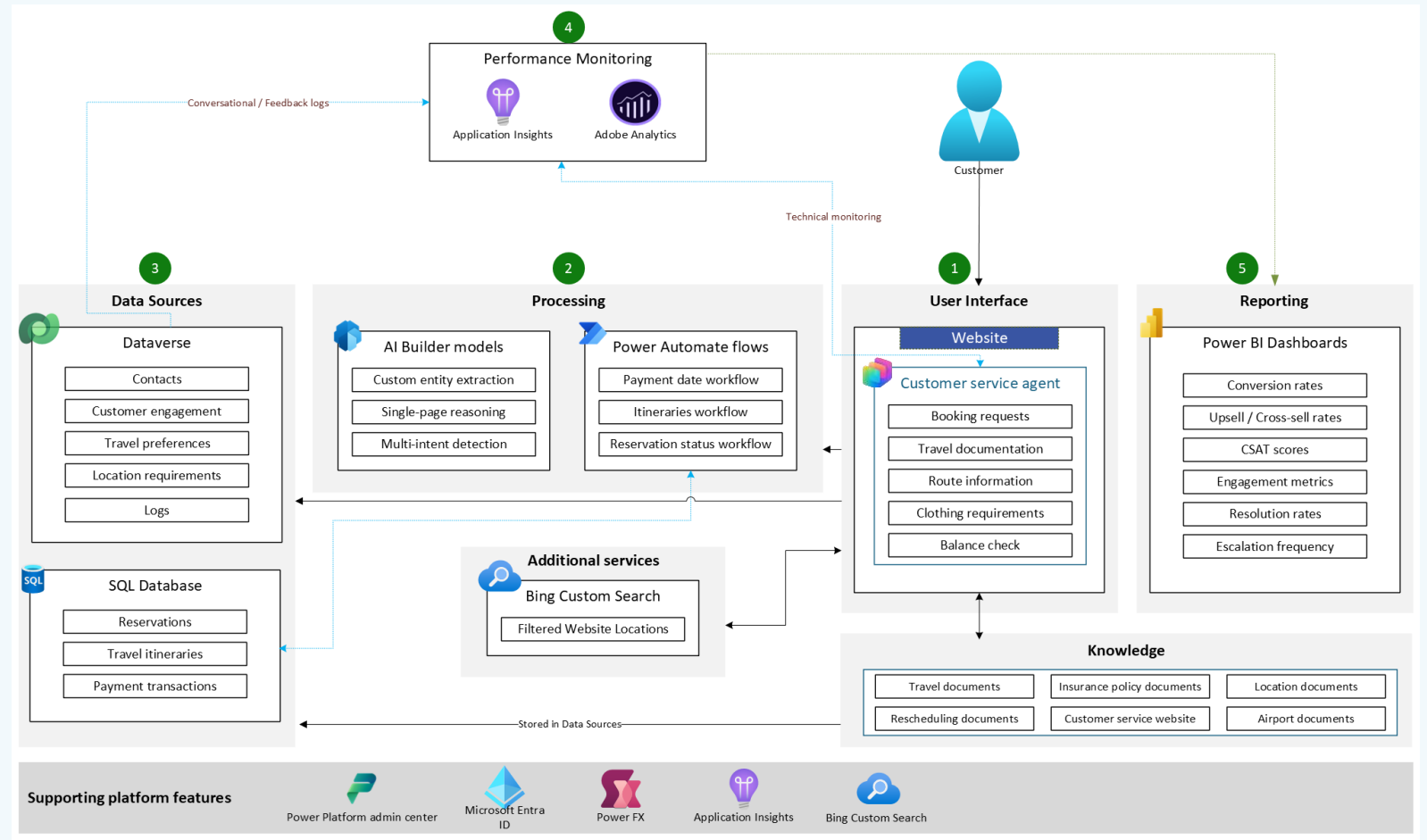
[Learn more >](#)



# Travel concierge

In this solution, a travel agency uses Copilot Studio and Dataverse to create a customer service agent that provides reduces call center interactions, improves data management and optimizes customer engagement.

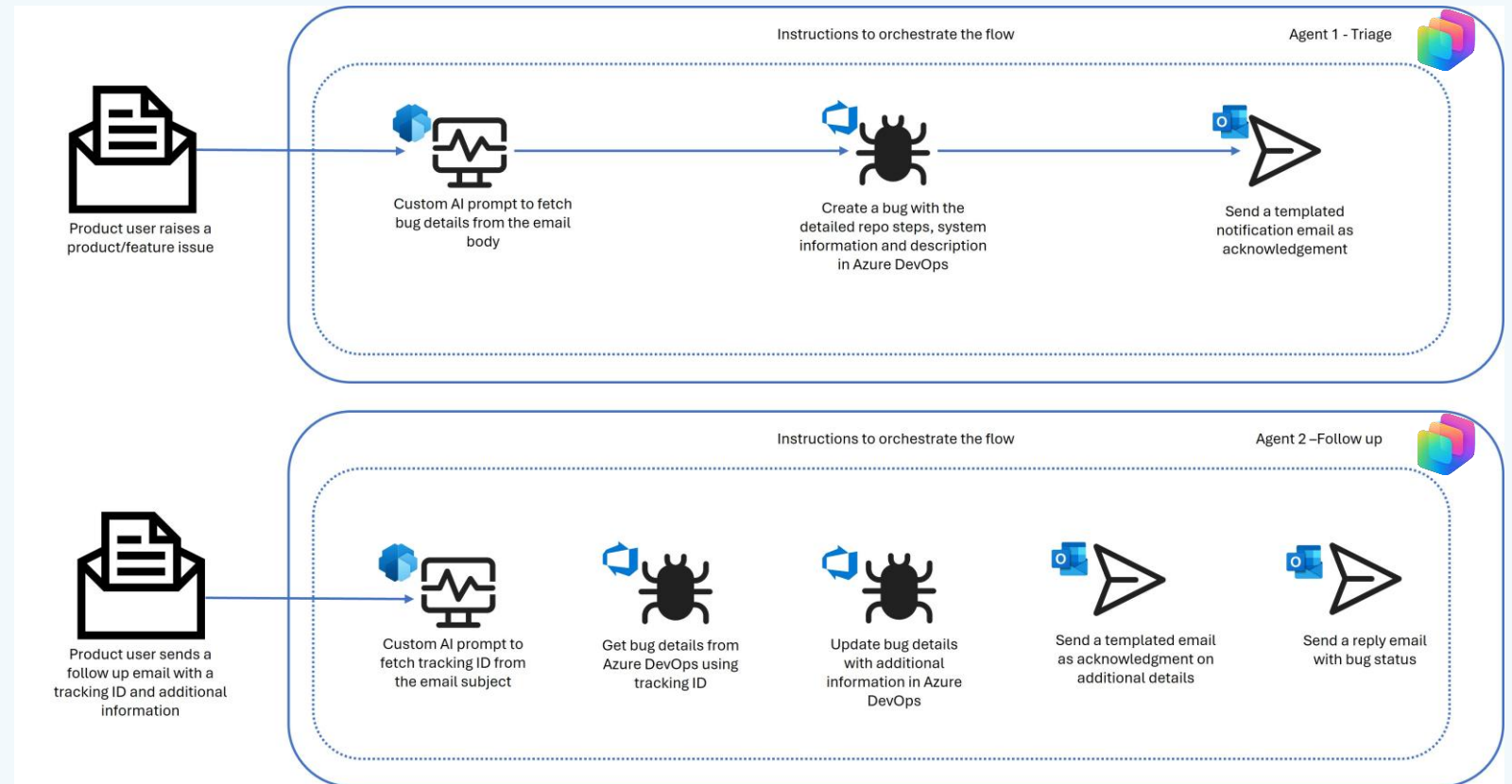
[Learn more >](#)



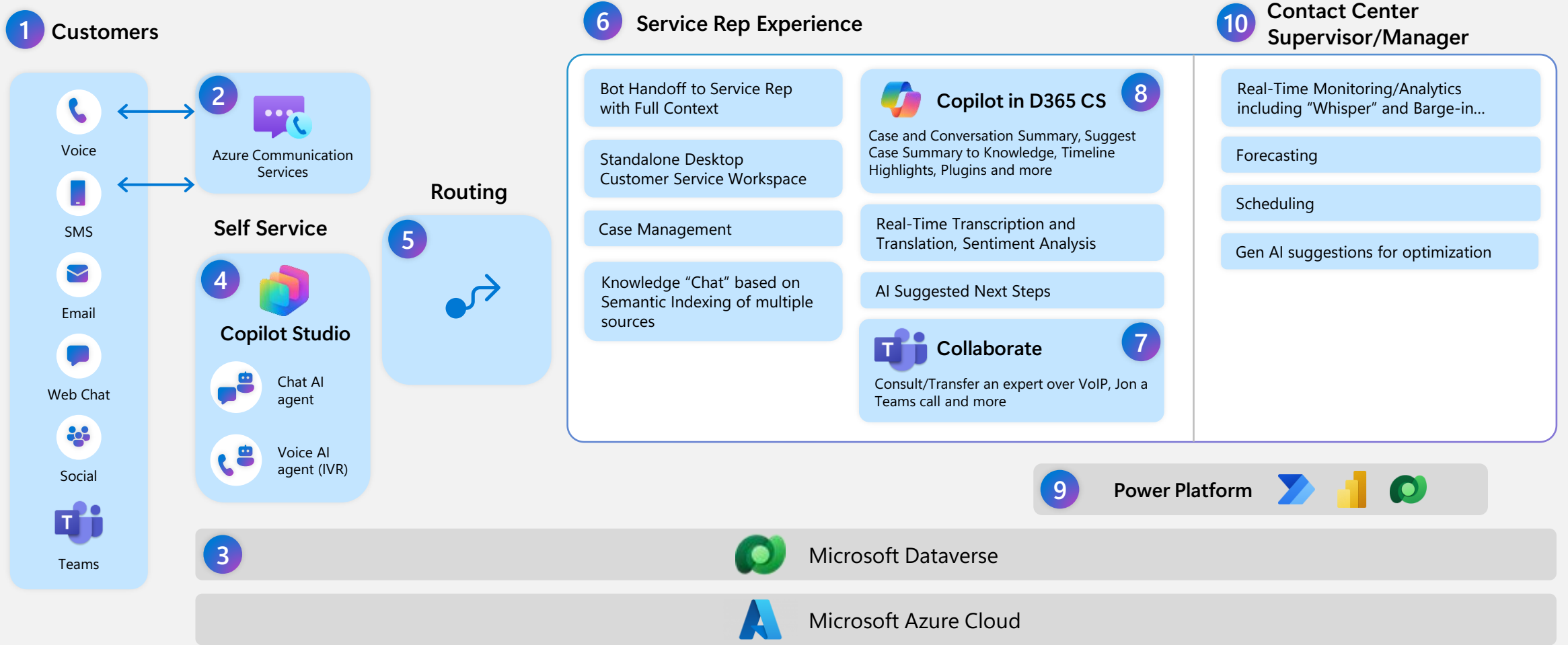
# Auto triage agent

In this solution, a software development team uses Copilot Studio and Azure DevOps to create an agent for automatic bug reporting that provides reduces the burden on customer support teams.

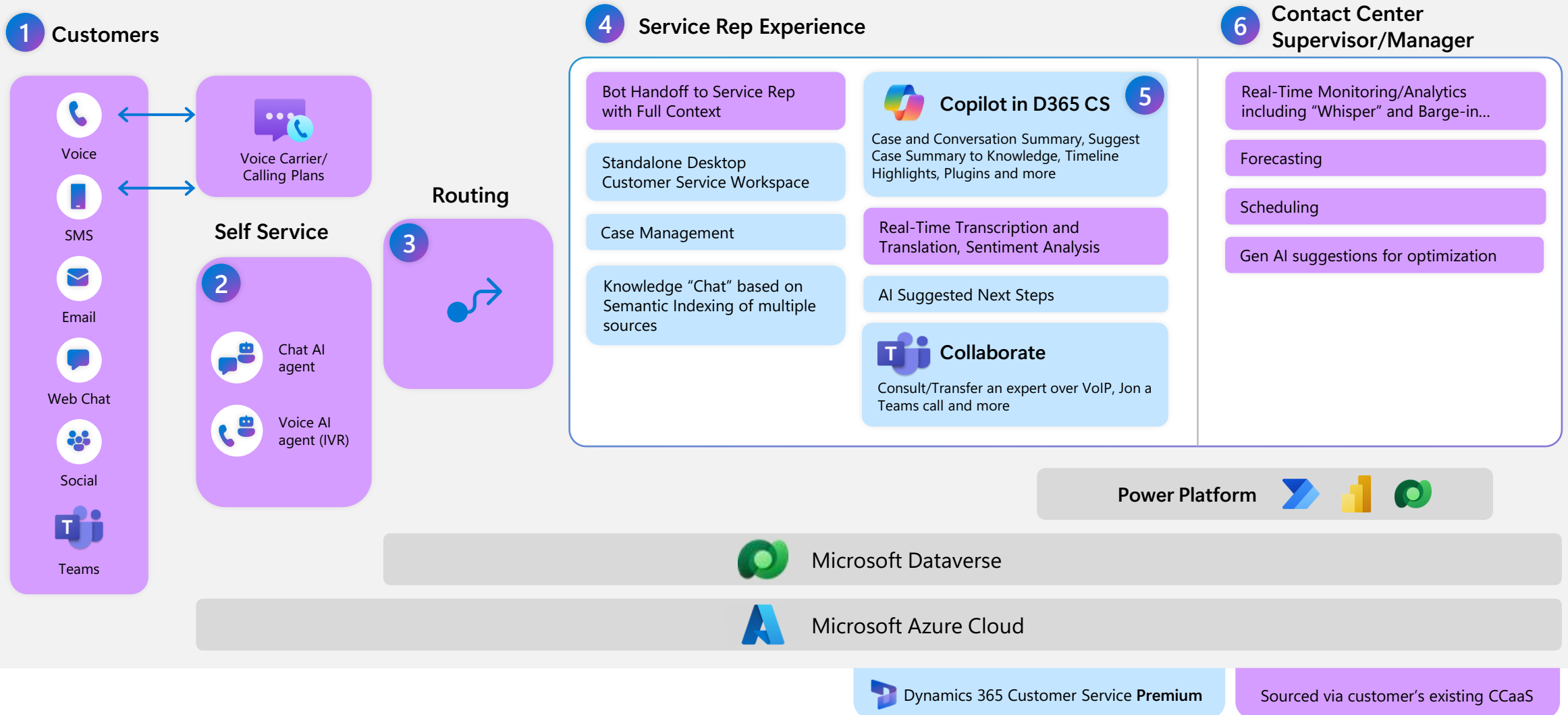
[Learn more >](#)



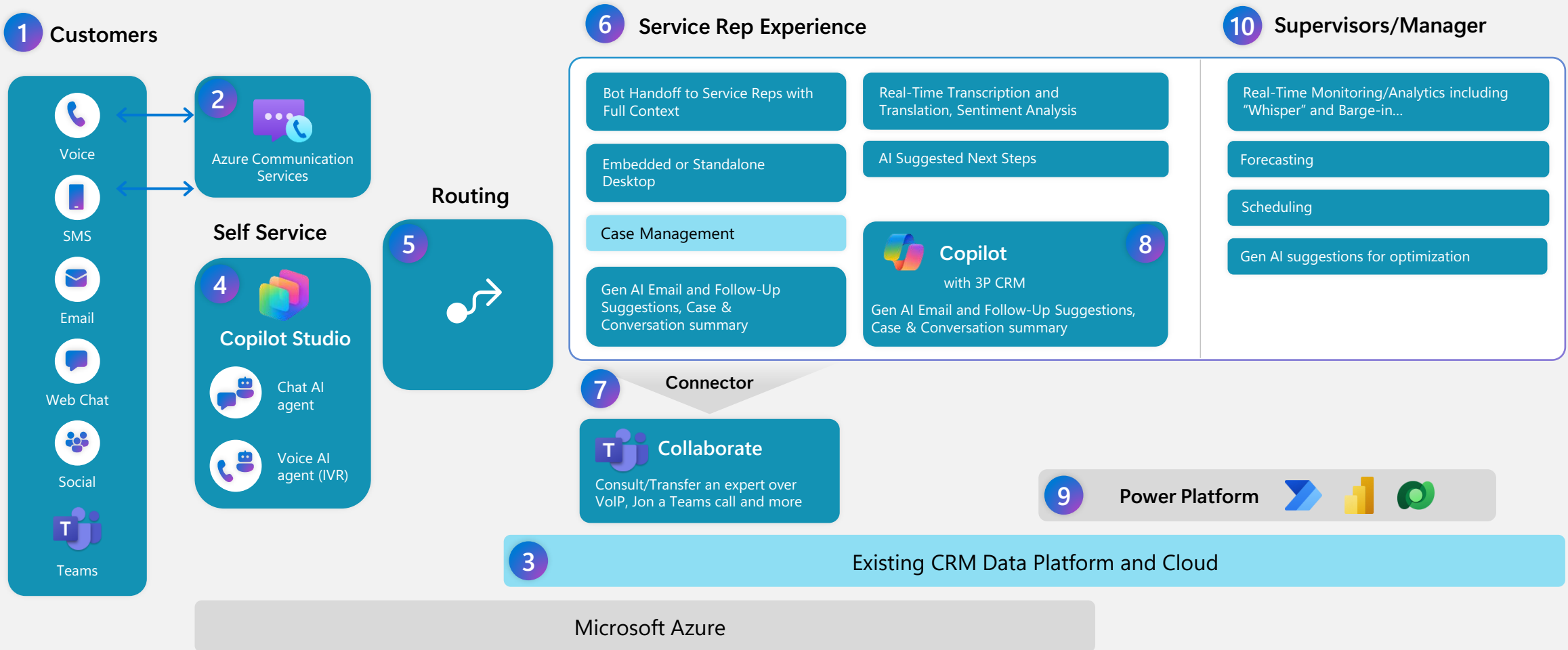
# Dynamics 365 Customer Service Premium for CCaaS and CRM



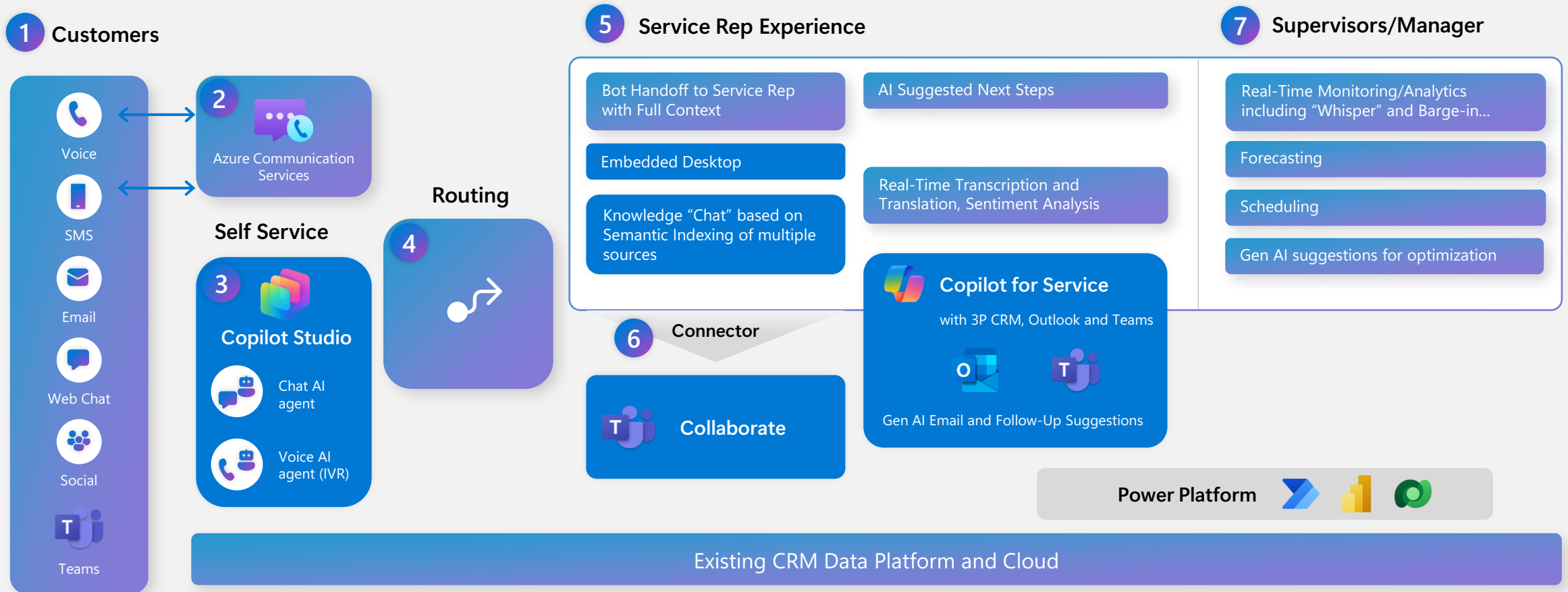
# Dynamics 365 Customer Service Enterprise with existing CCaaS



# Dynamics 365 Contact Center with existing CRM



# Copilot for Service and Copilot Studio with existing CCaaS and CRM





**Accenture**, a leading global professional services company that specializes in IT services and management consulting, created 9 autonomous business operations and industry agents to simplify complex operations and boost customer satisfaction.

"The simplicity of Copilot Studio's agentic platform, ease of use, and configurability played a critical role in our success."

- Rich Holsman, Senior Managing Director of Global Data and AI

**40%**

Increase in operational efficiency

**10-20%**

Increase in customer satisfaction scores

**15%**

Reduction in costs



**Apollo Travel Group**, a leading Nordic tour operator, expanded its AI knowledge base to reduce customer support traffic with easy self-service options with Copilot Studio, allowing agents to focus on cases that needed their signature expertise. Customers will get tailored answers in seconds—including details as granular as a gate number, thanks to AI generative actions, making their trips even smoother.

**50%**

Of customer inquiries handled

---

**5**

Languages supported

---

**87%**

Of sales happen online resulting in more conversations and revenue



## Cineplex reduces manual processing time through automation

“Our guest services agents are thrilled with the simplicity and functionality of the Microsoft Copilot Studio. Our copilot has processed over 5,000 refund requests in just 5 months—while reducing our handling time, back-office work and increasing both guest experience and our agent CSAT.”

- Monique Binder, Vice President of Guest Services

**5,000**

Refund requests processed in five months

**80%+**

Reduction in handling time for refund requests



### Challenge

Cineplex had many manual and time-consuming business processes that increased the likelihood of errors and inefficiencies in various departments such as finance and guest services. There was a lack of deep integration in existing systems leading to fragmented workflows and scalability issues that hindered their ability to expand and adapt quickly, which resulted in higher operational costs and a greater chance of human error.

### Solution

Cineplex created a Guest Services support agent to handle customer refund requests. The agent recognizes the refund type and initiates the appropriate desktop flows, which include integration with ServiceNow and the company’s other backend systems. They also built a Tax Management agent to categorize invoices from vendors and determine the applicability of provincial sales taxes.

### Impact

The Guest Services agent reduced back-office work while improving both the guest experience and customer satisfaction score. Handling time has been reduced from 5 to 15 minutes per request down to less than a minute—typically just 30 seconds. And the Tax Management agent saved an average of 30 minutes each time it’s used in the payment process.

Industry Media

Org size 10,000+ employees

Products Copilot Studio, Power Platform

[Read the full story here >](#)



# Holland America Line sees early signs of more informed purchasing

“Microsoft Copilot Studio [is] proving to be the fastest and easiest way to build complex, AI-driven agents.”

- Scot Pettit, Sr. Director of E-commerce

**1,000s**

Of conversations handled per week

**3 month**

Multi-wave rollout

**Industry** Travel/Transport **Org size** 10,000+ employees

**Products** Copilot Studio, Azure, Dataverse

[Read the full story here >](#)



## Challenge

Holland America Line needed to offer quicker, more personalized customer support without boosting call center traffic. Booking a cruise can be complex due to various stateroom and package options, and customers often find it difficult to prepare for their cruise and add services after booking.

## Solution

To tackle this issue, Holland America Line created an AI agent called "Anna" with Microsoft Copilot Studio. Anna assists customers and travel advisors with booking inquiries, adding services, and answering questions, enhancing the speed and personalization of customer support.

## Impact

The agent has achieved a strong resolution rate and is currently handling thousands of conversations per week. Telemetry is also indicating that Anna will reduce the number of basic informational queries to call center agents.



## Dow reimagines productivity and supply chain efficiency

"We're using Copilot Studio to create and connect agents to Copilot, helping drive an autonomous and sustainable supply chain and ensuring our operations remain effective for the customer, efficient for Dow, and sustainable for the environment"

- Jeff Tazelaar, Global ISC Innovation Director

**4k**

Daily shipping invoices processed

**100k**

Invoices received annually processed

**Industry** Manufacturing    **Org size** 10,000+ employees

**Products** Copilot Studio, Microsoft 365 Copilot

[Read the full story here >](#)



### Challenge

Dow faced significant challenges in cost management and operational efficiency within its supply chain. With millions at stake in logistics spending, the company sought a solution to improve billing accuracy, streamline processes, and reduce costly overcharges.

### Solution

After a successful initial rollout of Microsoft 365 Copilot to employees, Dow launched two supply chain agents to further optimize logistics, cut costs and prevent costly mistakes. One agent analyzes freight invoices and flags discrepancies, while the other autonomously processes PDF invoices from email and automatically detects and routes mismatches for correction.

### Impact

Using Microsoft 365 Copilot and AI agents built with Copilot Studio, Dow has greater supply chain visibility, smoother communication and collaboration among employees, and faster, more actionable insights across all business processes. They anticipate this will save them millions of dollars on shipping operations in the first year.



## Microsoft's AI assistant reshapes customer experience while driving engagement

"With Copilot Studio, we built the AI assistant to go beyond traditional search. Instead of just pointing users to documents, it delivers the exact piece of information they need, right when they need it."

- Brian Costea, Senior Director, Web Operations

**70%**

Increase in pages visited per session

**21.5%**

Increase in conversion rate

**Industry** Technology      **Org size** 10,000+ employees

**Products** Copilot Studio, Power Platform

[Read the full story here >](#)



### Challenge

Business customers often struggled to find specific information on Azure.com due to its extensive offerings, leading to inefficiencies and increased demand on sales representatives for non-sales queries.

### Solution

The Microsoft Cloud Marketing team built a custom AI agent using Copilot Studio and Power Platform. This AI assistant simplifies navigation, delivers precise information, and reduces the need for live chats with sales reps. It uses Power Automate to connect to Bing for trusted data sourcing, ensuring the agent stays within Microsoft.com.

### Impact

The AI agent has significantly improved the customer experience by making it easier to find information, boosting engagement, and supporting confident decision-making. It has also provided valuable insights into common customer questions, helping the team refine content and address customer needs more effectively.



## Pets at Home tackles retail fraud with autonomous AI agents

“The ability to bring in artificial intelligence and agents to work alongside our colleagues to provide them quicker insight and give them the ability to be more efficient allows us to scale and grow the business while improving our overall consumer service.”

- Simon Ellis, Head of AI Transformation & Enterprise Architecture

**10x**

Faster fraud identification

**20x**

More cases processed per day

**Industry** Retail

**Org size** 1,000-9,999 employees

**Products** Copilot Studio, Microsoft 365 Copilot, Azure

[Read the full story here >](#)



### Challenge

Pets at Home, the UK's largest pet care company, struggled to unify its stores, website, veterinary practices, and grooming services, which operated separately, making it hard to offer a seamless customer experience.

### Solution

Pets at Home used Azure to integrate data from various operations and Microsoft Copilot Studio to develop autonomous AI agents. One of these agents aids in retail fraud detection by quickly analyzing data and identifying issues, such as repeated photo use. This agent helps the team efficiently analyze transaction data and detect product issues through complaint tracking.

### Impact

AI and machine learning have enabled Pets at Home to offer personalized recommendations, enhancing customer experience. The company now provides relevant pet information to staff in stores, online, and at veterinary practices, improving engagement and streamlining operations.



## Rabobank streamlines and personalizes customer support

"We wanted a complete solution with the control, openness, and flexibility to tune it to our detailed needs and differentiate ourselves from virtual assistants in the market, and we found that in [Copilot Studio]."

- Chris den Arend, Solution Architect

**60-80k**

Calls handled per month

**12m**

Conversations processed per year

**Industry** Financial services **Org size** 10,000+ employees

**Products** Copilot Studio

[Read the full story here >](#)



### Challenge

Rabobank, a multinational banking institution, faced increasing customer expectations and technological disruptions. The company aimed to provide friendly, personalized, and efficient customer service on demand while reducing customer support costs.

### Solution

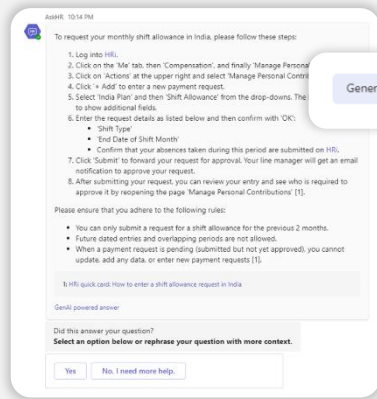
Rabobank adopted Copilot Studio (formerly Power Virtual Agents) to reconstruct its virtual agent solution. This allowed the bank to simplify operations, reduce costs, and create a cohesive customer experience. The integration capabilities of Copilot Studio enabled Rabobank to use CRM data for more personalized and relevant automated conversations.

### Impact

Rabobank streamlined and personalized customer support, empowered employees through automation, and efficiently routed conversations to the most suitable advisors. Now, 50% of customers who contact that bank have a fully automated experience.



# UBS optimizes HR support for employees



General Information/ monthly shift allowance request

**75%**  
Deflection from HR help desk using self-service

**130k**  
Employees using agent

**Industry** Financial services **Org size** 10,000+ employees

**Products** Copilot Studio, Microsoft 365 Copilot, Teams

[Published story coming soon](#)



## Challenge

UBS faced challenges with their legacy virtual assistant, which lacked sophistication and failed to provide relevant results to user queries. This led to a high number of unnecessary HR escalations and a poor user experience.

## Solution

UBS developed a conversational HR agent using Copilot Studio, integrating their ServiceNow HR document repository via a Graph Connector. The agent accurately answers employee questions with insights from ~1,300 knowledge base articles and is available to all employees via Microsoft Teams.

## Impact

UBS was able to quickly establish a comprehensive and efficient AI-driven solution, enhancing HR operations while ensuring governance and reliability. The agent is expected to significantly reduce the escalation rate to HR support.



香港大學  
THE UNIVERSITY OF HONG KONG

## The University of Hong Kong builds a more dynamic learning environment

“The UG Copilot provides quick and accurate answers to my questions making it much easier to navigate academic and administrative processes. I got the answers to almost all the questions I have on course registration. The UG Copilot really made my life at HKU much easier”

- Adrian Yung, HKU student

**39k**

Students

**13.7k**

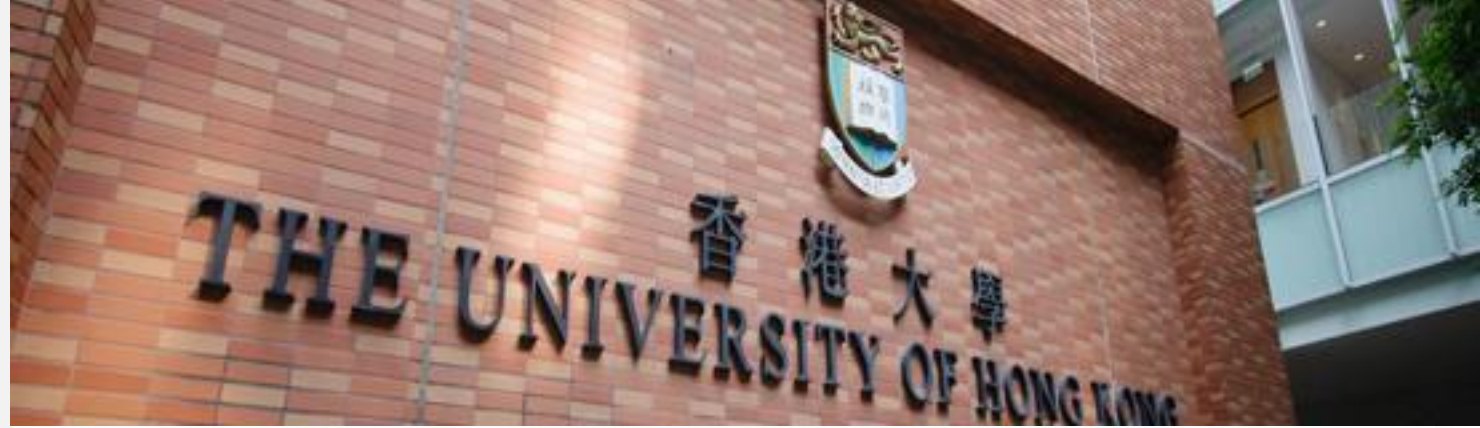
Admin staff and faculty

**Industry** Education

**Org size** 1,000-9,999 employees

**Products** Copilot Studio, Microsoft 365 Copilot

[Read the full story here >](#)



### Challenge

HKU faced a complex onboarding process for its diverse student body and an increasing administrative workload for faculty and staff, making it difficult to manage the growing student population and hybrid learning models.

### Solution

In addition to rolling out Microsoft 365 Copilot, HKU introduced the HKU First-Year UG Copilot, a GenAI-powered agent designed to assist first-year students with a wide range of academic inquiries on topics like course selection and scholarship opportunities.

### Impact

The HK First-Year UG Copilot has enhanced student support by providing quick and accurate answers, reduced the faculty's burden by handling large volumes of queries, and improved engagement, creating a more dynamic and supportive learning environment for both students and faculty.