

# Copilot Agents

Personal Productivity to Process Transformation

Genevieve Wood

Functional Consultant, Data#3

Steve Bedwell

Modern Work Specialist, Data#3

JuiceIT2025

SIMPLIFY  
CONNECT  
PROTECT

# Agenda

- What are Agents?
- The Spectrum of Agents
- Microsoft Agent Landscape
- Building your first Agent
  - A peek at Agent Builder and the 'Building Blocks' for Copilot Studio
- The Data#3 approach



Copilot

Your personal AI  
assistant for work

The "UI for AI"

---

Grounded in work content like email,  
meetings & documents



Agents

AI enabled  
Business Processes

Works on behalf of employees, teams &  
functions

---

Connected to Copilot or autonomous



Copilot

Your personal AI  
assistant for work

User initiated 





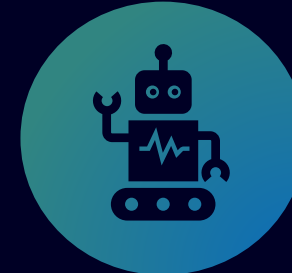
Sales Rep



Agents

AI enabled  
Business Processes

User initiated   
or  
Automated 



Sales Qualification Agent

# Spectrum of agents

← Simple ————— Advanced →



Retrieval



Task



Autonomous

←----- Agents vary in levels of complexity and capabilities depending on your need -----→



# Spectrum of agents

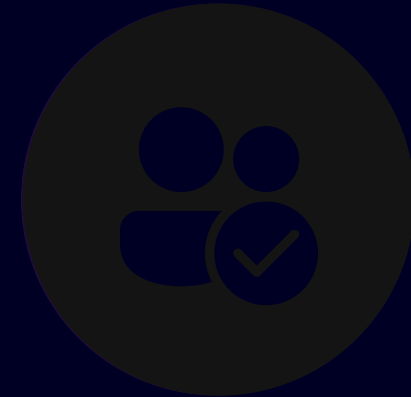
← Simple ————— Advanced →



Retrieval



Task



Autonomous

←----- Agents vary in levels of complexity and capabilities depending on your need -----→

# Spectrum of agents

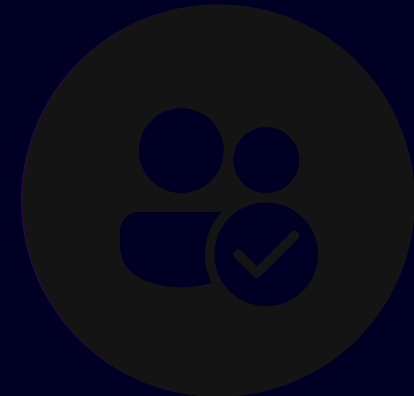
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Retrieval



Task



Autonomous

←----- Agents vary in levels of complexity and capabilities depending on your need -----→

# Spectrum of agents

← Simple ————— Advanced →



Retrieval



Task



Autonomous

←----- Agents vary in levels of complexity and capabilities depending on your need -----→



# 5 Core Business Domains to Automate



# Microsoft Agent Landscape



M365 Copilot  
Agents



SharePoint  
Agents



Dynamics 365  
Agents



Copilot Studio  
Templates

Built by  Microsoft



AppSource  
Marketplace

Built by Others



Agent  
Builder



Copilot  
Studio



Azure AI  
Foundry

Natural  
language

Code  
-first

Built by You



M365 Copilot  
Agents



SharePoint  
Agents



Dynamics 365  
Agents



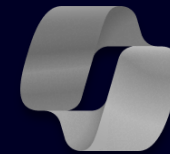
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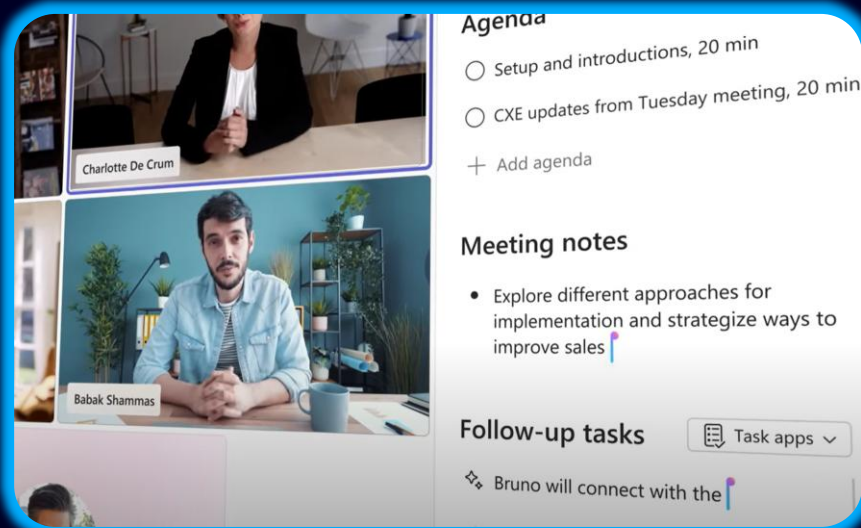
Azure AI  
Foundry

Natural  
language

Code  
-first

Built by You

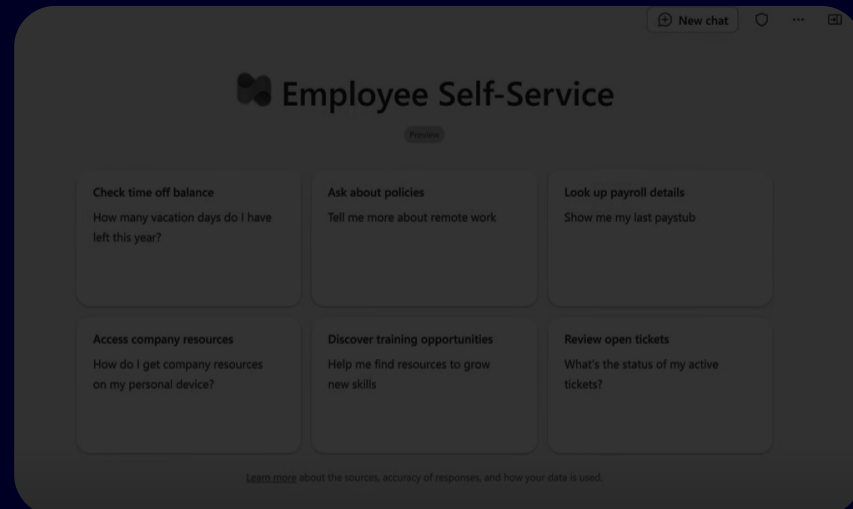
# Microsoft 365 Copilot Agents



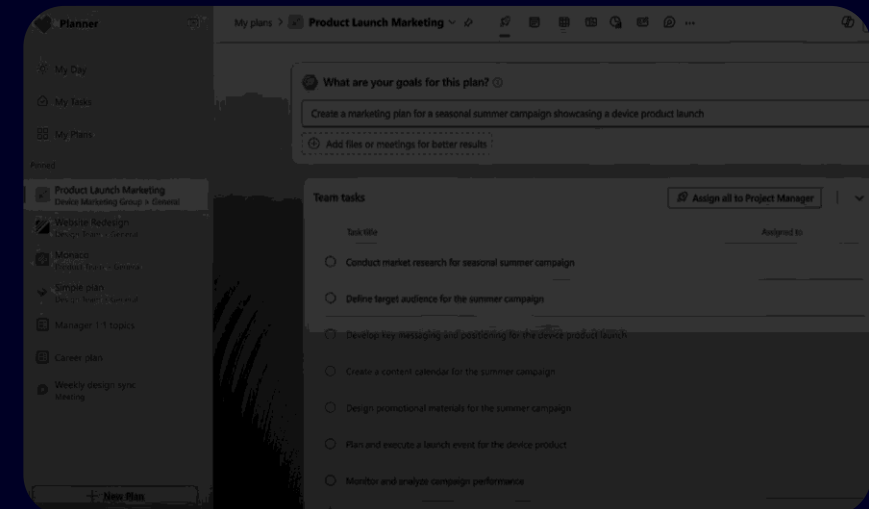
Facilitator



Interpreter

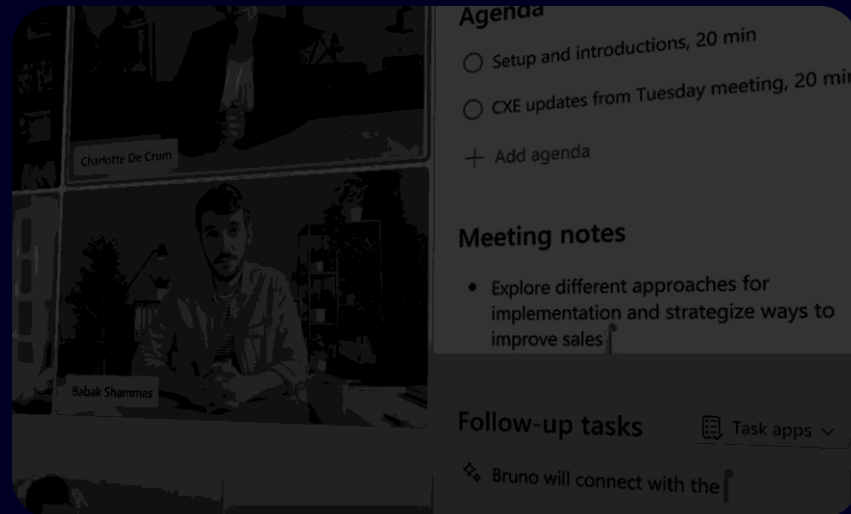


Employee Self-Help



Project Manager

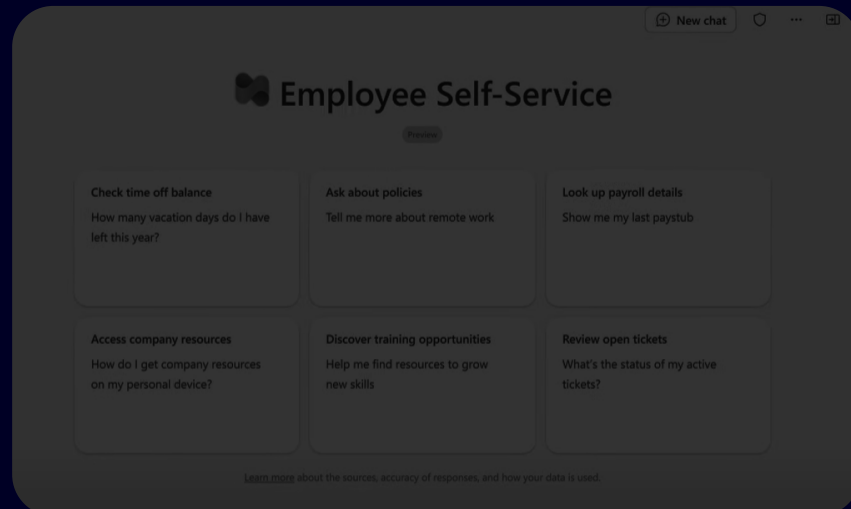
# Microsoft 365 Copilot Agents



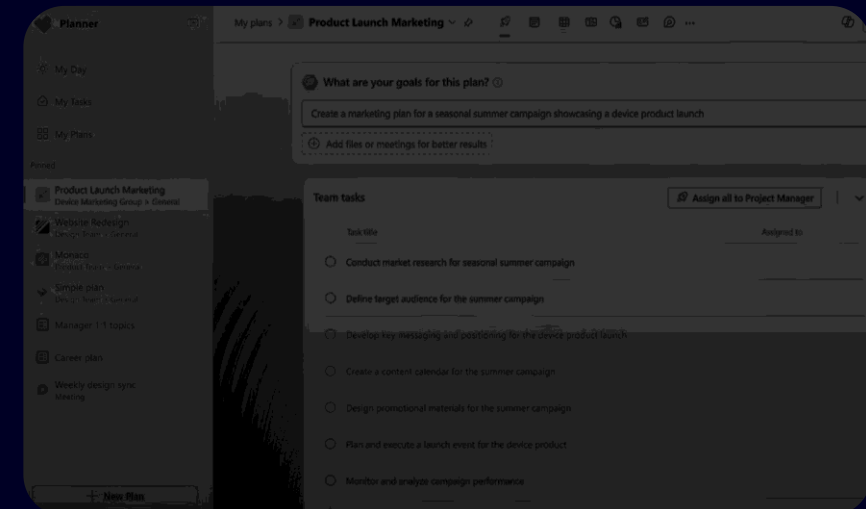
Facilitator



Interpreter

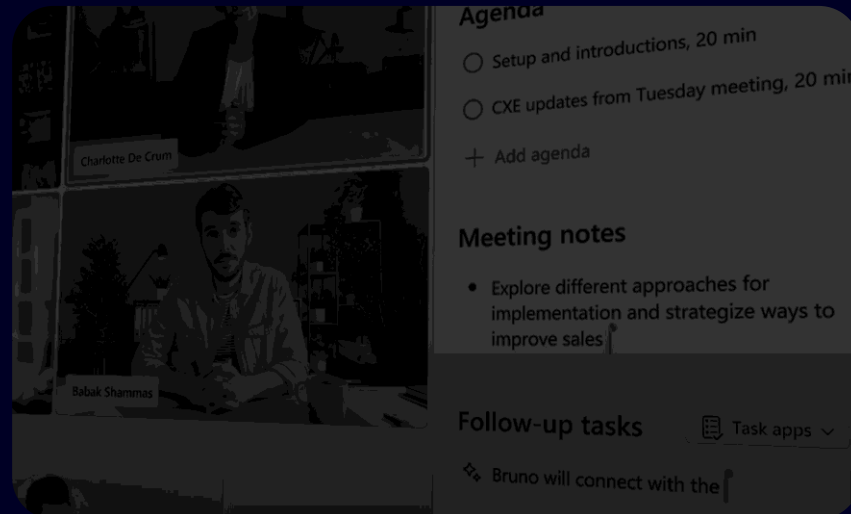


Employee Self-Help



Project Manager

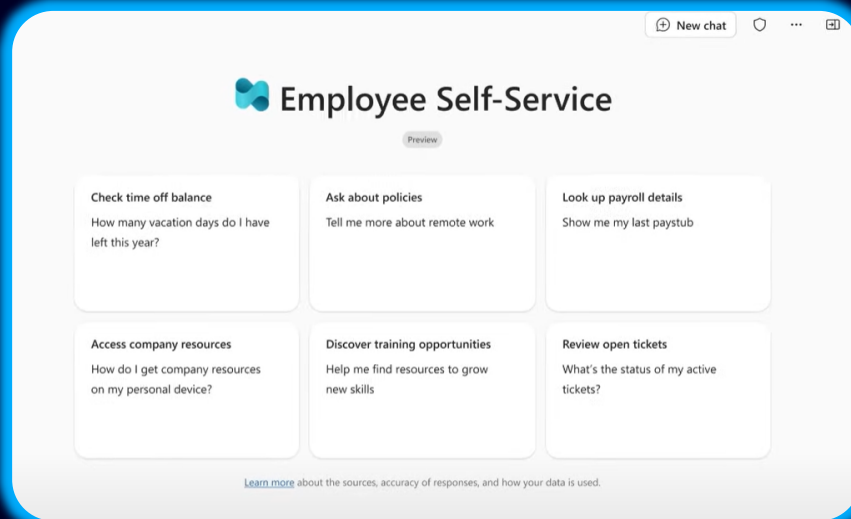
# Microsoft 365 Copilot Agents



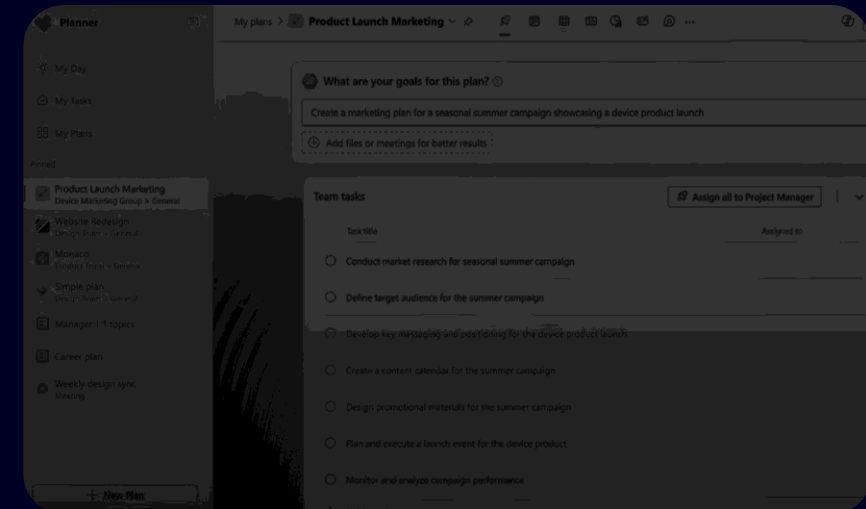
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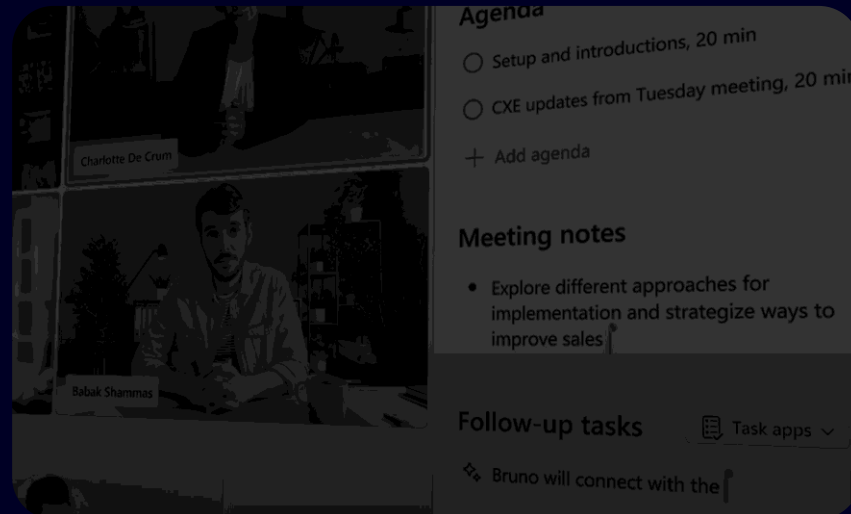


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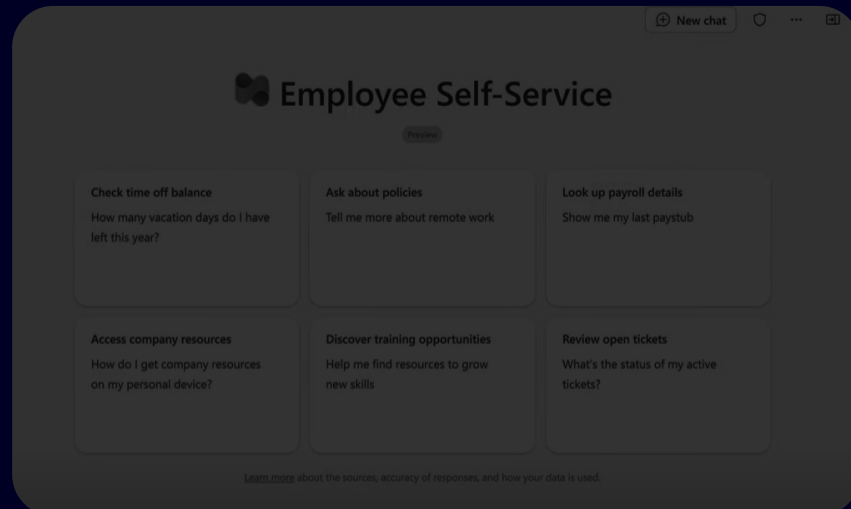
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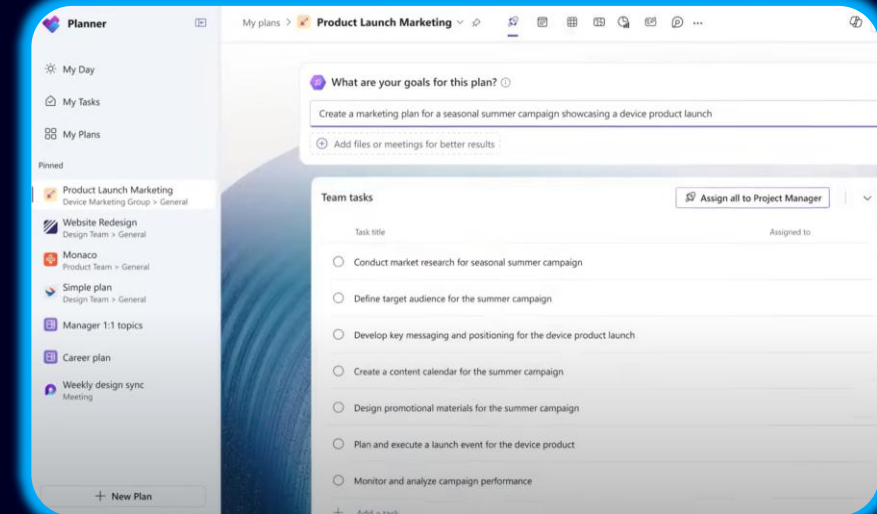
Facilitator



Interpreter



Employee Self-Help



Project Manager



# Microsoft 365 Copilot Agents



Headphone device product launch

00:10

People Raise React View Notes Rooms Copilot Whiteboard Apps More Camera Mic Share Leave

**Meeting chat**

9:35 AM

Good morning everyone!

Hey Team, not sure if anyone was able to attend IST timezone meeting but did they mention anything about our Q2 targets?

Serena Davis 9:37 AM

I unfortunately wasn't able to attend.

We can debrief in the meeting later.

Aadi Kapoor 10:00 AM

Sounds good, I attended, so I can share.

12:00 PM Meeting started

AI-generated notes have been turned on. [Learn more](#)

Type a message

**Participants:**

- Beth Davies
- Aadi Kapoor
- Charlotte De Crum
- Serena Davis
- Babak Shammass
- Kat Larsson
- Bruno Zhao

Facilitator



M365 Copilot  
Agents



SharePoint  
Agents



Dynamics 365  
Agents



Copilot Studio  
Templates

Built by  Microsoft



AppSource  
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Built by Others



Agent  
Builder



Copilot  
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Built by You

# SharePoint Agents



The screenshot shows a SharePoint site for 'Boulder Innovations'. The main content area features a large image of an EV charging station with the text '\$0.15 per kWh' and 'Unlock excellence by exploring Boulder Innovations' field services resources'. To the right, there are two smaller images: one of a person running with the text 'Sustainable, cutting-edge EV charge' and 'Learn more →', and another of a car with the text 'Latest product announcements'. A chat window titled 'Product Maintenance agent' is open on the right, displaying a message: 'This is an agent based on the content of the Product Maintenance site'. Below this message are three search prompts: 'What are the top service categories?', 'What are the latest product manuals for the DX-100?', and 'What are the code requirements for EV installs in CA?'. At the bottom of the chat window, there is a text input field with the placeholder 'Describe what you'd like to do or use / to reference files, people, and more' and a character count '2102/2000'.

## Ready-made agent for every site

Automatically scoped to the content on that site

## Create your own SharePoint agent

Change content scope, instructions and behaviour

## Share agent with others

Share your agent and include it in Teams conversations



M365 Copilot  
Agents



SharePoint  
Agents



Dynamics 365  
Agents



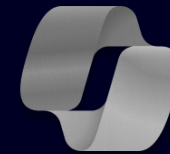
Copilot Studio  
Templates

Built by  Microsoft



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-first

Built by You

# Dynamics 365 Agents



Case Management



Customer  
Intent



Knowledge  
Management

Customer  
Service



Sales Qualification



Sales  
Order

Sales



Financial  
Reconciliation



Account  
Reconciliation

Finance



Supplier  
Communications



Scheduling  
Operations



Time and  
Expense

and more...



M365 Copilot  
Agents



SharePoint  
Agents



Dynamics 365  
Agents



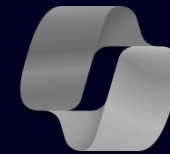
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-first





Built by You

# Don't start from scratch...







  
Website Q&A IT Helpdesk  
  
Voice Agent Self Help




Provide  
Answers

  
Case Management Approval Manager  
  
Store Operations Status Tracker

Streamline  
Operations

  
Job Craft CV Match  
  
Safe Travels Benefits

Supercharge  
HR

  
Kudos Team Navigator  
  
Wellness Check Inclusivity

Foster  
Teams

*... get started with Copilot Studio templates*





M365 Copilot  
Agents



SharePoint  
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Built by You

# Agent Marketplace

## Apps

Search apps and more

**Apps**

Added by your org

Built for your organisation

**Featured**

Popular on teams

**Agents**

Top picks

Top rated apps

M365 certified

AI-powered apps

**Categories**

Built by Microsoft

Education

Productivity

Image & video galleries

Project management

Utilities



[See more](#)

**Workflows**

Manage your apps

## Agents

Filter



**Prompt Coach**   
Microsoft Corporation

Open

Write and improve your prompts

★ 4.4 (7 ratings)

Productivity Training & tutorial



**Learning Coach**   
Microsoft Corporation

Open

Unlock your potential with Learning Coach

★ 2.8 (5 ratings)

Productivity Training & tutorial



**Matter**   
MatterApp inc.

Request

Employee Recognition, Rewards, Surveys, and ...

★ 5.0 (938 ratings)

Communication Human resources & recruiting



**Klaxoon**   
Klaxoon

Request

With Klaxoon in Microsoft Teams, maximize e...

★ 4.5 (16 ratings)

Communication Training & tutorial



**1Page**   
OAYAW, Inc.

Request

Supercharge your meetings with 1Page summ...

★ 5.0 (6 ratings)

Productivity Sales & marketing



**iPlanner Pro**   
iGlobe

Request

iPlanner Pro - Extending Microsoft 365 Planne...

★ 4.9 (7 ratings)

Communication Productivity



**FactSet**   
FactSet

Request

Leverage the power and intelligence of FactSe...

★ 5.0 (4 ratings)

Financial management Communication



**Jira Cloud**   
Atlassian.com

Request

Empower your team to track, update, and ma...

★ 4.1 (430 ratings)

IT/Admin Project management



**Miro**   
Miro

Request

Create, embed, pin, search and get notificatio...

★ 4.0 (33 ratings)

Communication Productivity



**Viva Goals**   
Microsoft Corporation

Open

Achieve purpose and alignment with Microsof...

★ 3.8 (3.1K ratings)

Communication Productivity



**Trello**   
Atlassian.com

Open

Trello lets you work more collaboratively and ...

★ 3.4 (117 ratings)

Communication Productivity



**Dropbox**   
Dropbox, Inc.

Request

Share files and upload content to Dropbox wit...



★ 4.4 (36 ratings)

Communication Content management

**monday.com**   
monday.com



Request

Enhance your Microsoft 365 tools with project...

**Mural**   
Mural

Request

Take ideas from imagination to activation with...

**Confluence Cloud**   
Atlassian.com

Request

Capture rich meeting notes, share pages, & st...



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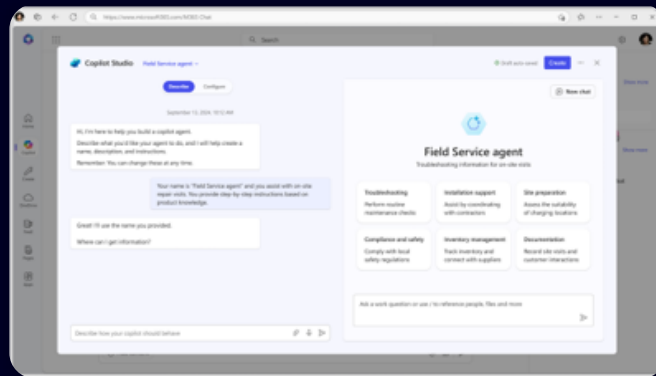
Azure AI  
Foundry

Natural  
language

Code  
-first

Built by You

# Build your own Agents

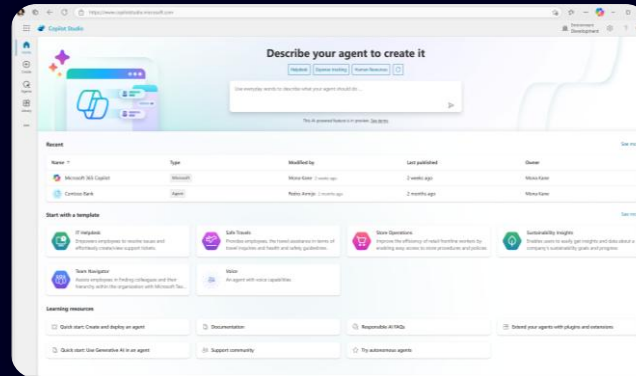


Natural language



Agent builder

For End Users



Copilot Studio

For Makers



Azure + Visual Studio / GitHub

For Developers

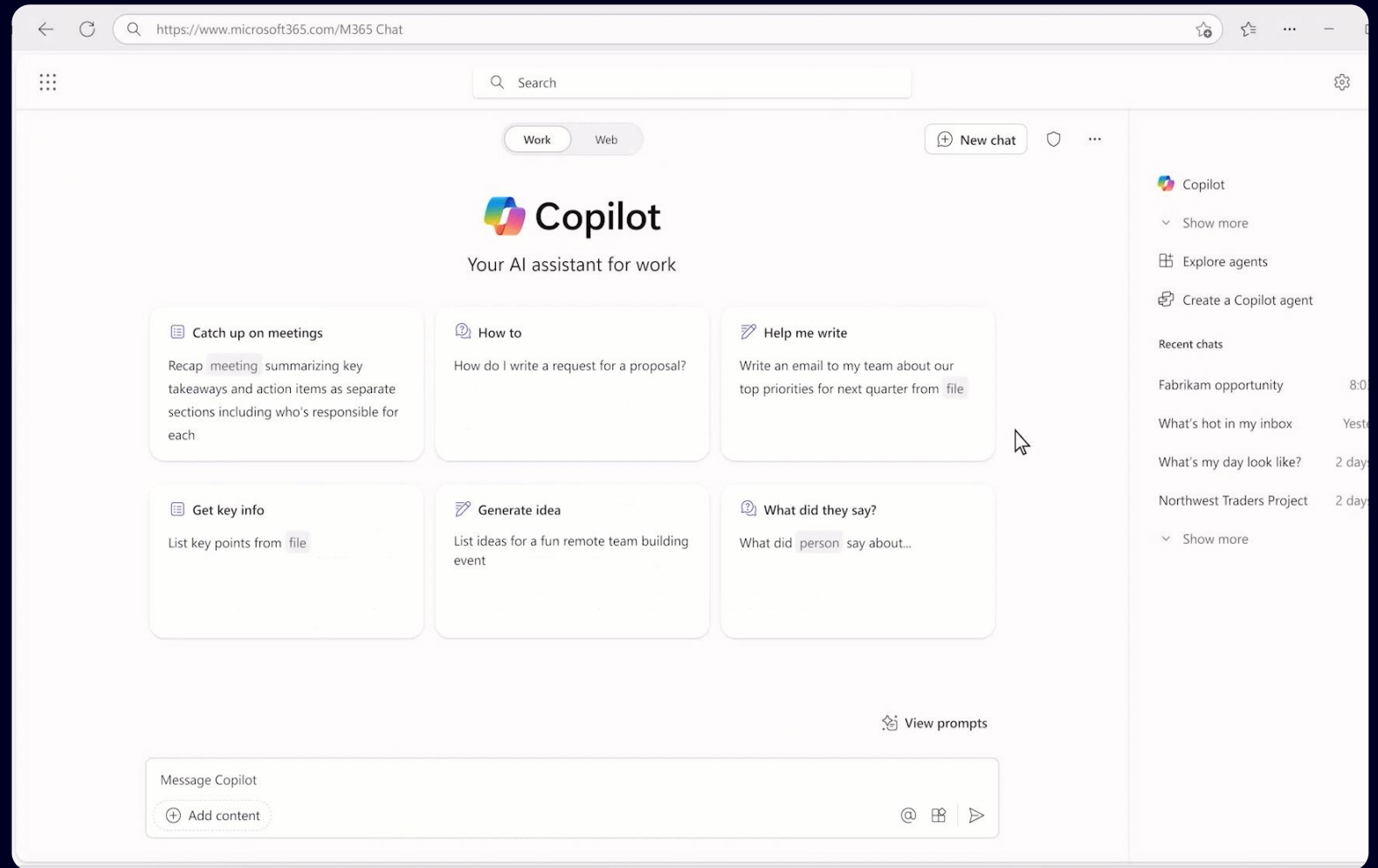


Code-first



## Agent Builder for End-Users

- Seamlessly integrated into M365
- Easy, natural language creation
- AI productivity and automation on the existing user workflow





# Microsoft Copilot Studio for Makers

- Extend Microsoft Copilot
- Build your own agents
- Bring your enterprise data, APIs and knowledge sources
- Add actions and create autonomous agents

Describe your copilot to create it

Helpdesk Expense tracking Human Resources

Use everyday words to describe what your copilot should do ...

This AI-powered feature is in preview. [See terms](#)

Name ↑	Type	Modified by	Last published	Owner
Copilot for Microsoft 365	Copilot	Mona Kane 2 weeks ago	2 weeks ago	Mona Kane
Copilot for Sales	Copilot	Pedro Armijo 2 months ago	2 months ago	Mona Kane

Start with a template

- Approval Manager**  
Streamline your approval process across multiple systems with summarized requests
- Job Craft**  
Revolutionize your HR approach with AI-constructed job descriptions and refined interview questions
- Organization Navigator**  
Assists employees in finding colleagues and their hierarchy within the organization with Microsoft Tea...
- Safe Travels**  
Provides employees, the travel assistance in terms of travel inquiries and health and safety guides.
- Store Operations**  
Revolutionize your HR approach with AI-constructed job descriptions and refined interview questions
- Sustainability Insights**  
Enables users to easily get insights and data about a company's sustainability goals and progress
- Weather**  
Your go-to assistant for getting weather forecasts across regions where your company operates
- Website Q&A**  
A copilot that can answers common questions from users using the content on your web site.

Learning resources

- Quick start: Create and deploy a copilot
- Documentation
- Responsible AI FAQs
- Extend your copilots with plugins and extension
- Quick start: Use Generative AI in a copilot
- Support community
- Try Copilot Agents
- Security and governance in Copilot Studio

# Agent building blocks



## Knowledge

Data in or outside of M365 that your agent can query



## Actions

Tasks and processes your agent can perform across LOB services/apps



## Logic

Defined conversation paths for your agent to follow when triggered



## Channels

Where and how your end users engage with your agent





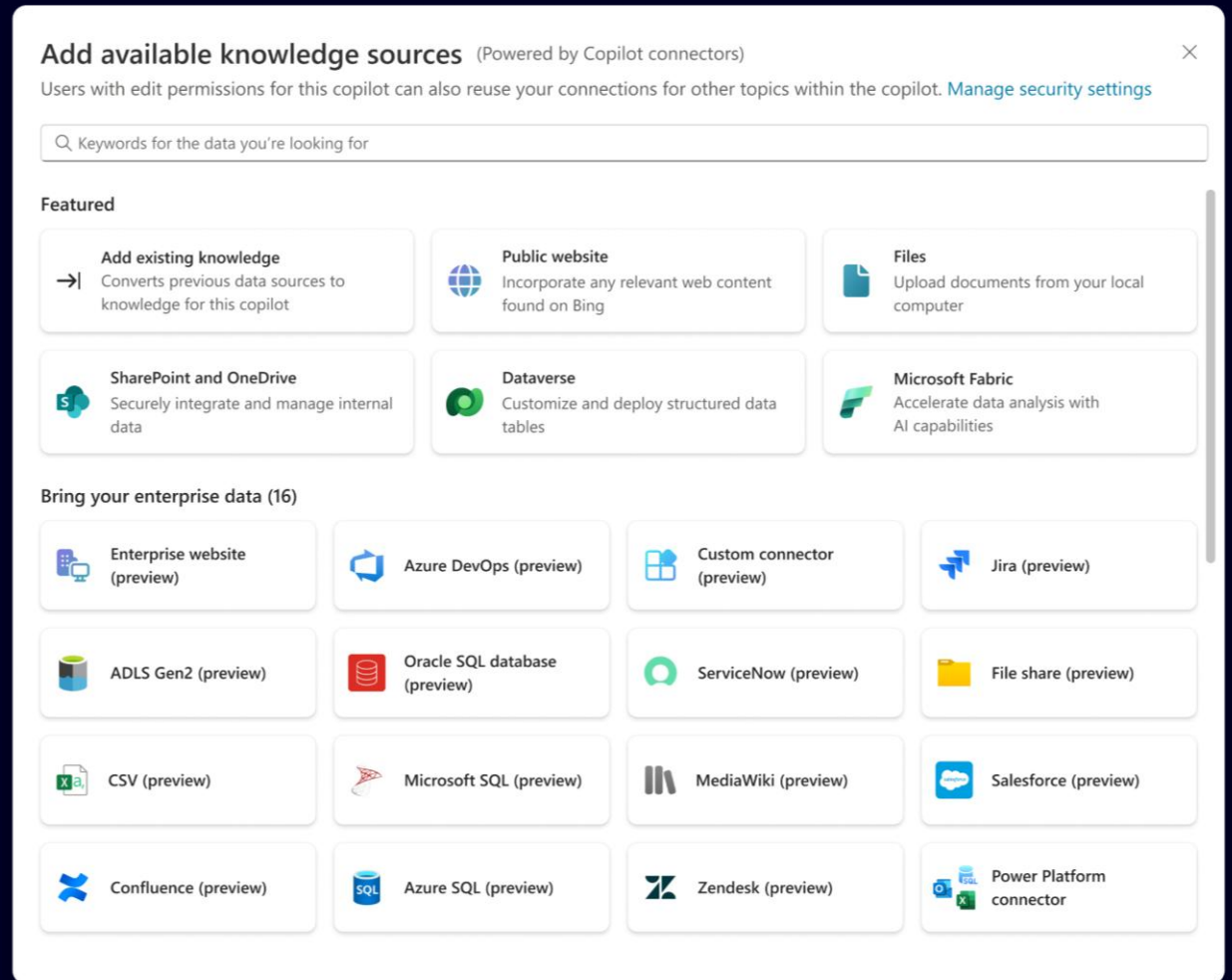


# Knowledge

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

Growing number of knowledge source connectors.

Allows you to create an **immediately useful agent**.





# Actions



Easily connect to your key line of business systems.

Enable your agent to **automate your business processes** and complete tasks.

Tell your agent when to execute an **action** by adding autonomous triggers.

## Step 1 of 3: Choose an action

Create an action or browse through our list of actions you want to use to get information from external sources.

[Learn more](#)

### Discover an action

Search for flows, skill actions, and commonly used connector actions

11 actions found

Connectors

Custom Connectors

Flows

Skills

Dataverse



Untitled

Get information about industries, solutions, services and cont...



Run a flow built with Power Automate for desktop  
Desktop flows



Delete a row

Excel Online (Business)



Run script

Excel Online (Business)



Get a row

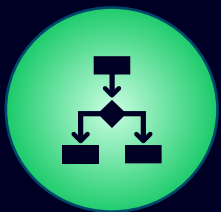
Excel Online (Business)



Run script from SharePoint library

Excel Online (Business)

Cancel

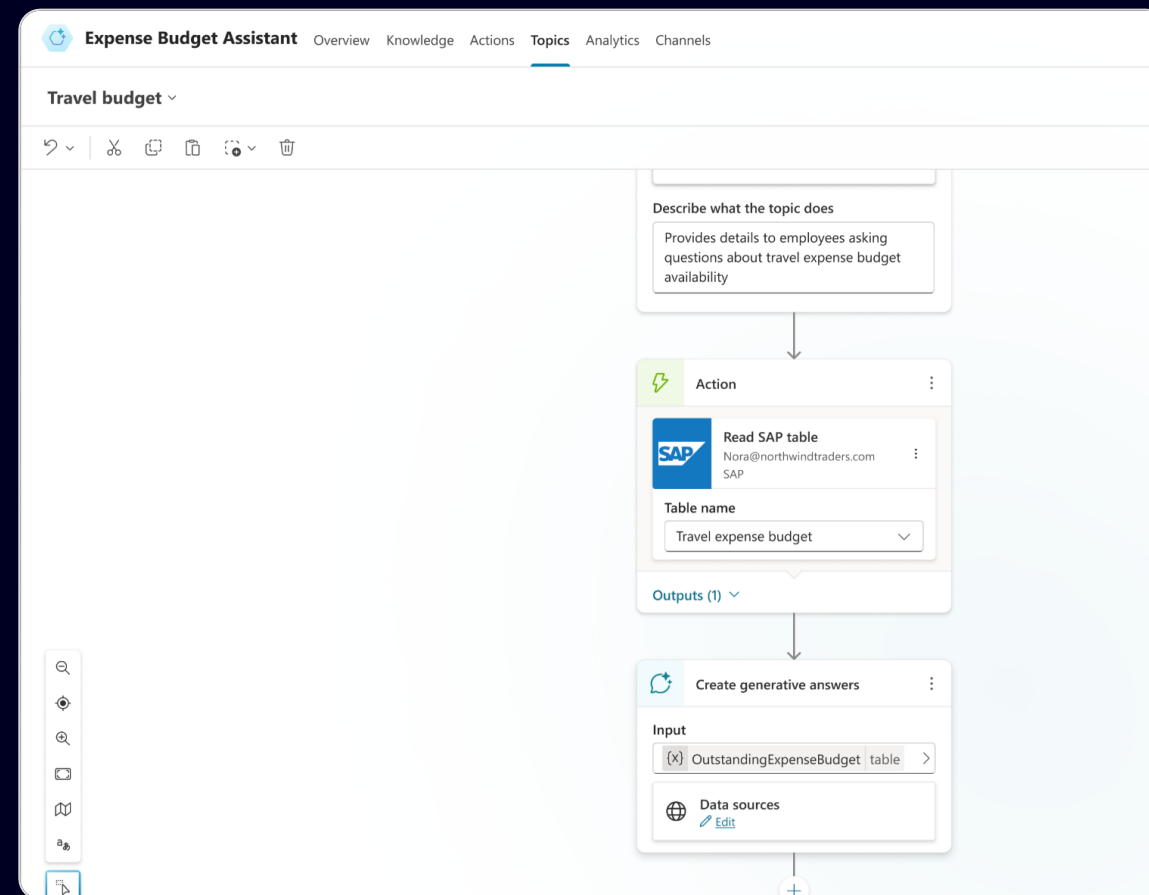


# Logic

Have complete control over critical scenarios by designing **specific step-by step topics**.

Easily mix and manage both **generative and custom dialog** in one system.

Connect to your contact center to hand off the conversation with full context to a live human agent.





# Channels

**Publish and deploy** to your channels of choice with a single click.

Add your agent to a custom app built with **Power Apps** or a **custom website built with Power Pages**.

You can access even more channels through ISVs, including:



WeChat



WhatsApp  
through Twilio



Google's Business  
Messages



Apple Messages  
for Business



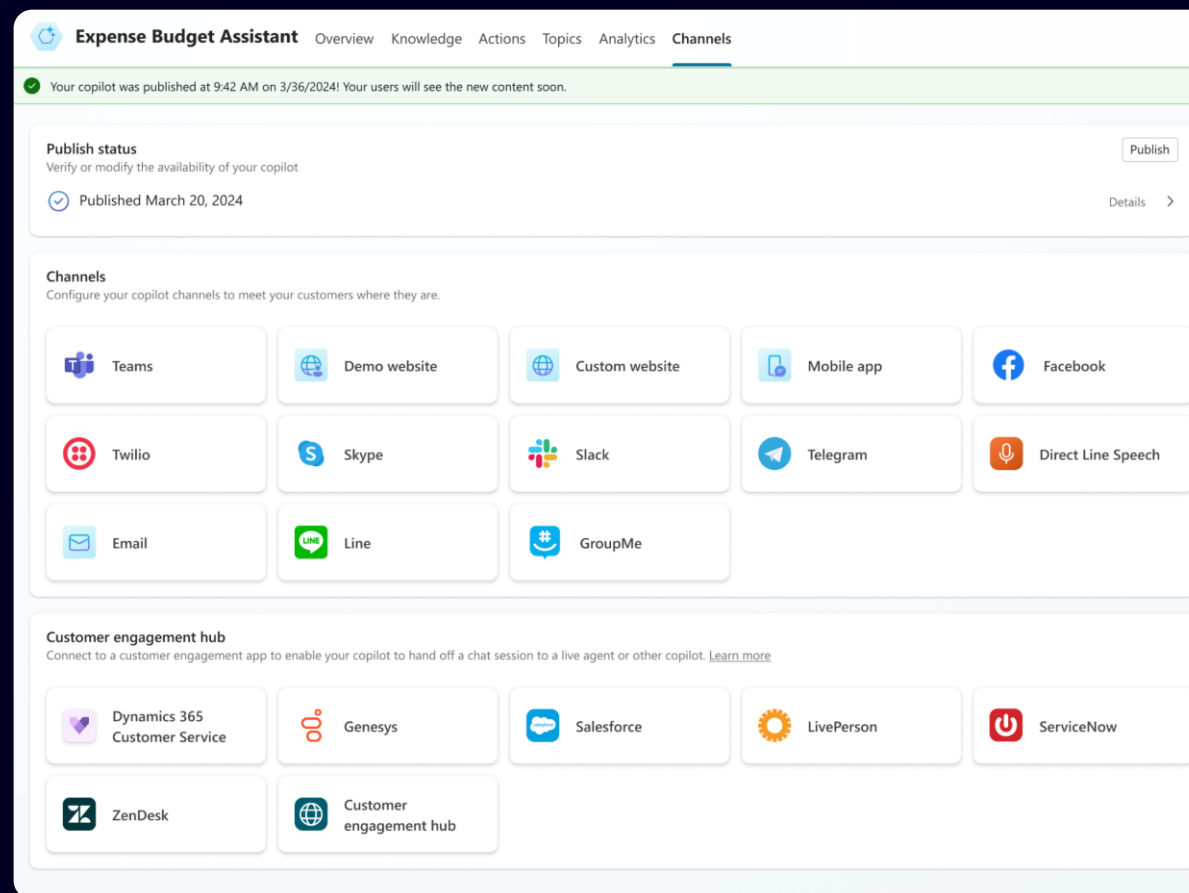
Azure  
Communication  
Services



TeleSign



Custom



# Autonomous agents

Handle variability and complexity at infinite scale

**Independently** begins tasks based on autonomous triggers

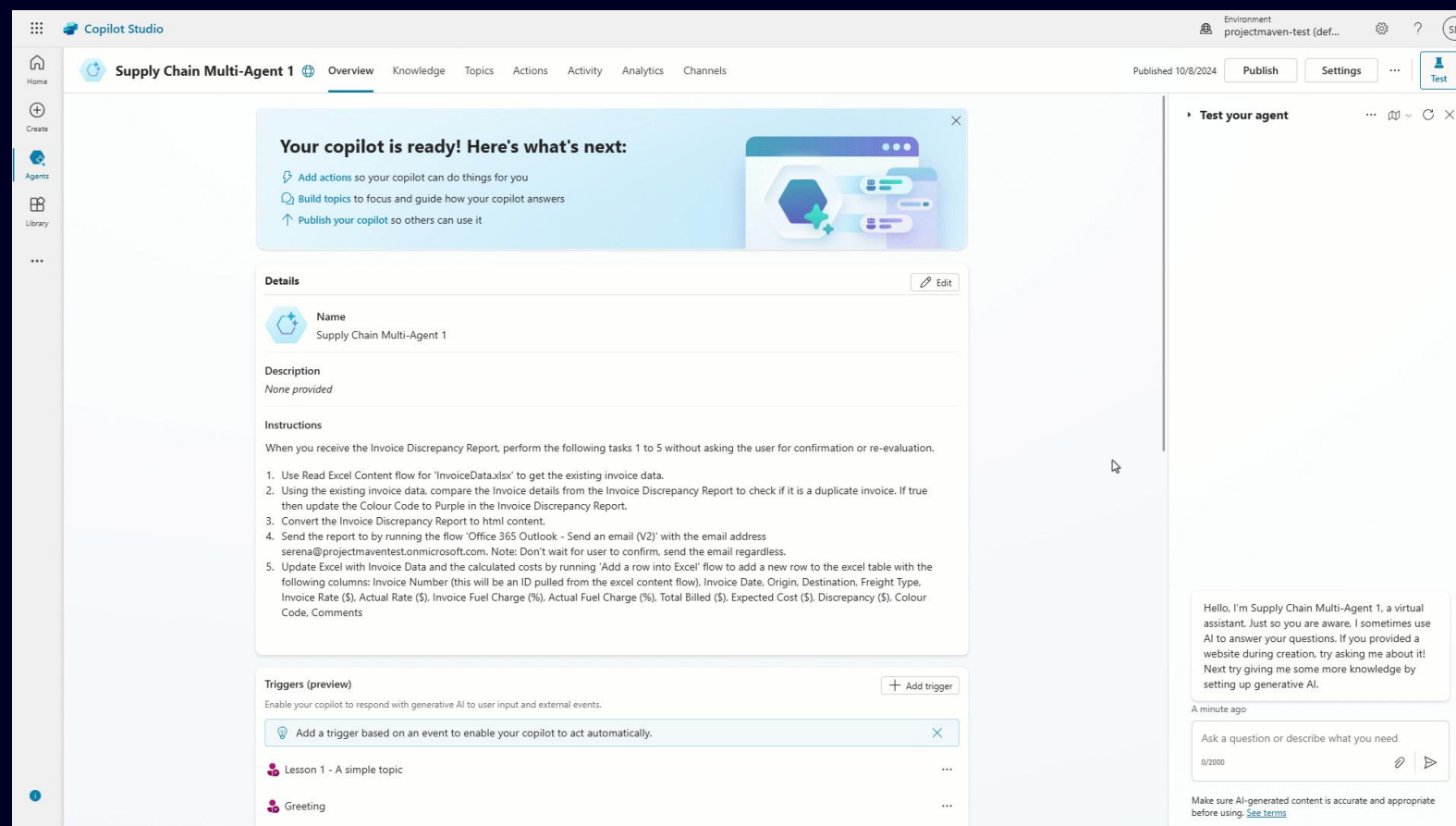
**Automates** long running processes

Dynamically **reasons** over its capabilities

**Learns** and improves

Follows **human guard rails** and asks for help

**Orchestrates** other agents



# Best Practices for Agent Management



# Best Practices for Agent Management



## Power Platform Strategy

---

Where will **development, testing, and production** Agents be hosted?

Who will have **access to create and modify** Agents in each environment?



# Best Practices for Agent Management



## Power Platform Strategy

---

Where will **development, testing, and production** Agents be hosted?

Who will have **access to create and modify** Agents in each environment?



## Data Access Policies

---

What **data sources** will Agents have access to?

How do **security policies** (data classification, access controls, DLP, etc.) apply to Agents?



# Best Practices for Agent Management



## Power Platform Strategy

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Where will **development, testing, and production** Agents be hosted?

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What **data sources** will Agents have access to?

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## Agent Lifecycle

---

How will Agents be monitored for **usage, performance, and compliance**?

What is the process for **deploying, updating and retiring** Agents?

# “Agent Ideas Generator” Autonomous Agent

**Get Agent Ideas**

Hi, Steve. When you submit this form, the owner will see your name and email address.

\* Required

1. Name \*

John Smith

2. Company Name \*

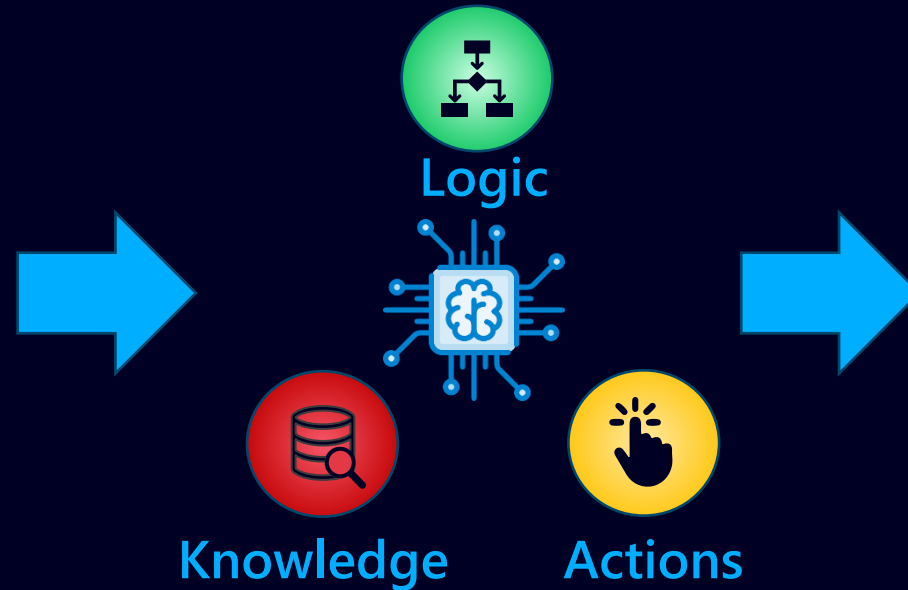
Exxon Mobil

3. Email \*

john.smith@exxonmobil.com

Submit

User submits form



Agent processes  
request

**Agent Ideas for Exxon Mobil**

Dear John Smith,

Thank you for submitting your request for agent ideas.

It's impressive to see the innovative work being done at Exxon Mobil, a leader in the oil and gas industry. Here are 5 examples of agents you could build in your organisation:

1. **Predictive Maintenance Agent:** Identifies potential equipment failures before they happen to reduce downtime and maintenance costs.
2. **Energy Efficiency Advisor:** Monitors energy usage and suggests ways to reduce costs and improve efficiency.
3. **Supply Chain Coordinator:** Optimizes supply chain logistics for cost and time efficiency.
4. **Emissions Monitoring Agent:** Tracks and reports greenhouse gas emissions to ensure compliance with environmental regulations.
5. **Safety Compliance Checker:** Ensures workplace safety by monitoring adherence to standards and regulations.

For more success stories of AI agents being used within the oil and gas industry, you can visit [Microsoft AI Lab](#).

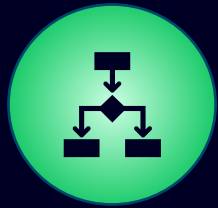
If you would like to discuss deploying agents in your organisation in more detail, you can book a 30-minute consult with our specialists using this [link](#).

Best regards,  
Data#3 Team



Data#3 - Empowering your business with AI


Ideas are emailed by  
agent

# “Agent Ideas Generator” Autonomous Agent



Logic

 **Agent Idea Generator**  Overview Knowledge Topics Actions Activity Analytics Channels

**Name**  
Agent Idea Generator

**Description**  
This agent is used by users to generate ideas of AI agents they can build in their own organisation.

**Instructions**  
**Objective 1**  

You are an agent that generates ideas for users on what kinds of agents they can create based on their company vertical. Users will simply supply their name, email and their company name. You will intelligently infer their vertical from the company name. For all responses, use Australian English spelling and grammar.

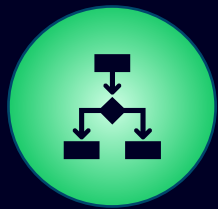
**Receive the user details from a form**  
Users will fill the Agent Ideas Generator form with fields "Name", "Company Name" and "Email"

**Search your knowledge**  
Using your knowledge in "AI Agent Ideas.docx", come up with relevant ideas for agents based on the company vertical that you have inferred from their company name.  
Also search <https://www.microsoft.com/en-us/ai/> public website. This contains customer success stories that will be emailed.



**Respond with email**


1. *Send an Email:* Send an email using the 'Office 365 Outlook - Send an email (V2)' action with a polite tone
2. Provide a warm greeting: Reference the person by name. Thank them for submitting their request for agent ideas.
3. Disclose the vertical: That has been inferred from the user's company name. For example "Wow you work for CompanyX! That sounds like a <Government, Healthcare, Legal> organisation". Do not limit yourself to those 3 examples. Vary the statement to not just say "Wow" every time but similar type phrases. Include a sentence that's complimentary about their specific organisation. If you can understand nuance in the type of organisation for example Local, State or Federal governments, then tailor the agent ideas appropriately.
4. Provide 5 agent ideas:


# “Agent Ideas Generator” Autonomous Agent




Logic

 **Agent Idea Generator**  Overview Knowledge Topics Actions Activity Analytics Channels


 <https://www.microsoft.com/en-us/ai/> ...


 AI Agent ideas.docx ...

See all



**Actions**  Add action


Add actions to empower the AI to complete specific tasks for improved engagement.

 Office 365 Outlook - Send an email (V2) ...


**Triggers**  Add trigger


Set up your agent to activate when certain events happen. [Learn more.](#)


 When form is submitted by a user to receive agent ideas → Use content from variables  ...

**Topics**  Add topic

Add conversation topics to focus and guide the way your agent answers.

 Goodbye ...

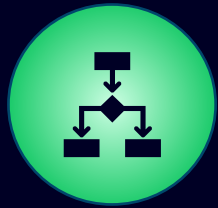
 Greeting ...

 Start Over ...


See all

Published agent status

# “Agent Ideas Generator” Autonomous Agent



Logic

**Agent Idea Generator**

OverviewKnowledgeTopicsActionsActivityAnalyticsChannels

3. Lastly, Invite the user that if they would like to discuss deploying agents in their organisation in more detail, they can book a 30 minute consult with our specialists using this link  
<https://outlook.office365.com/owa/calendar/Data3Services@data3showcase.onmicrosoft.com/bookings/>

4. Use HTML formatting for the email body:

- Ensure the string you generate to pass to the action uses HTML tags for appropriate formatting including line breaks.
- Incorporate CSS into the HTML formatted string to format the email as a modern, sleek blue theme that includes a top and bottom banner with hex color #0F6CBD
- Text within the banners should be hex color #FFFFFF
- Rounded edges should be used on the banners.

**Objective 2**

When a Booking is made using the autonomous trigger, the agent should send an email to [steve\\_bedwell@data3.com.au](mailto:steve_bedwell@data3.com.au) with the customer name, contact details and email.

Orchestration

Use generative AI to determine how best to respond to users and events (preview). [Learn more](#)

☒ Enabled

Analytics

Check your agent's key performance info from the last 7 days.

Total sessions ⓘ

Engagement ⓘ

Satisfaction score ⓘ

16

0%

--

Open Analytics

Knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

+ Add knowledge

Allow the AI to use its own general knowledge. [Learn more](#)

☐ Enabled

# “Agent Ideas Generator” Autonomous Agent



## Knowledge

**Agent Idea Generator** Overview **Knowledge** Topics Actions Activity Analytics Channels Publish

[+ Add knowledge](#)

**Suggestions (preview)**

**Add knowledge sources**

Review suggestions for references to add to your agent.

[View suggestions](#)

**Improve answer rate**

Tell your agent how to answer questions using the fine tuning tool.

[Open tool](#)

**Track knowledge use**

Make sure your agent uses knowledge sources in at least 25% of responses.

[Open Analytics](#)

Total knowledge source use ⓘ

0%







Error rate ⓘ

0%

Total answer rate ⓘ

0%

[All](#) [Files](#) [Public website](#) [Last refreshed 1 minute ago](#)

Name	Type	Last modified	Status
 <a href="https://www.microsoft.com/en-us/ai/">https://www.microsoft.com/en-us/ai/</a>	 Public website	Steve Bedwell 7 days ago	 Ready
 AI Agent ideas - all industries.docx	 Files	Steve Bedwell 7 days ago	 Ready

Allow the AI to use its own general knowledge. [Learn more](#) ☒ Enabled

# “Agent Ideas Generator” Autonomous Agent



## Actions


**Agent Idea Generator** Overview Knowledge Topics Actions Activity Analytics Channels


Total sessions ⓘ 16 Engagement ⓘ 0% Satisfaction score ⓘ --

**Knowledge** + Add knowledge

Add data, files, and other resources to inform and improve AI-generated responses.

Allow the AI to use its own general knowledge. [Learn more](#) ☒ Enabled


 <https://www.microsoft.com/en-us/ai/> ...

 AI Agent ideas.docx ...

[See all](#)


**Actions** + Add action

Add actions to empower the AI to complete specific tasks for improved engagement.

 Office 365 Outlook - Send an email (V2) ...

**Triggers** + Add trigger

Set up your agent to activate when certain events happen. [Learn more](#)

 When form is submitted by a user to receive agent ideas → Use content from variables ...

**Topics** + Add topic



# “Agent Ideas Generator” Autonomous Agent

## AI Agent Ideas for Dance Central



Dear Genevieve,

Thank you for reaching out to us with your request for AI agent ideas. It's fantastic to see Dance Central exploring innovative solutions to enhance your operations and customer engagement.

Given that Dance Central is a prominent organisation in the entertainment and dance industry, here are 5 examples of agents you could build:

1. **Event Scheduling Agent:** This agent can help manage and schedule events, performances, and rehearsals by coordinating with artists, venues, and other stakeholders. It can send reminders and updates to ensure everyone is on the same page.
2. **Ticketing Support Agent:** This agent can assist customers with purchasing tickets, answering queries about events, and providing information on seating arrangements and pricing. It can also handle refunds and exchanges.
3. **Social Media Engagement Agent:** This agent can manage social media accounts by posting updates, responding to comments and messages, and engaging with followers. It can help increase visibility and interaction with fans.
4. **Merchandise Sales Agent:** This agent can handle the sale of merchandise such as costumes, dancewear, and souvenirs. It can provide product information, process orders, and track inventory.
5. **Training and Tutorial Agent:** This agent can offer dance tutorials and training sessions, providing step-by-step instructions and feedback. It can cater to different skill levels and styles, helping dancers improve their techniques.



These agents can help streamline operations and enhance customer engagement in the entertainment and dance industry.



For more success stories of AI agents being used within the entertainment industry, you can visit [this link](#).

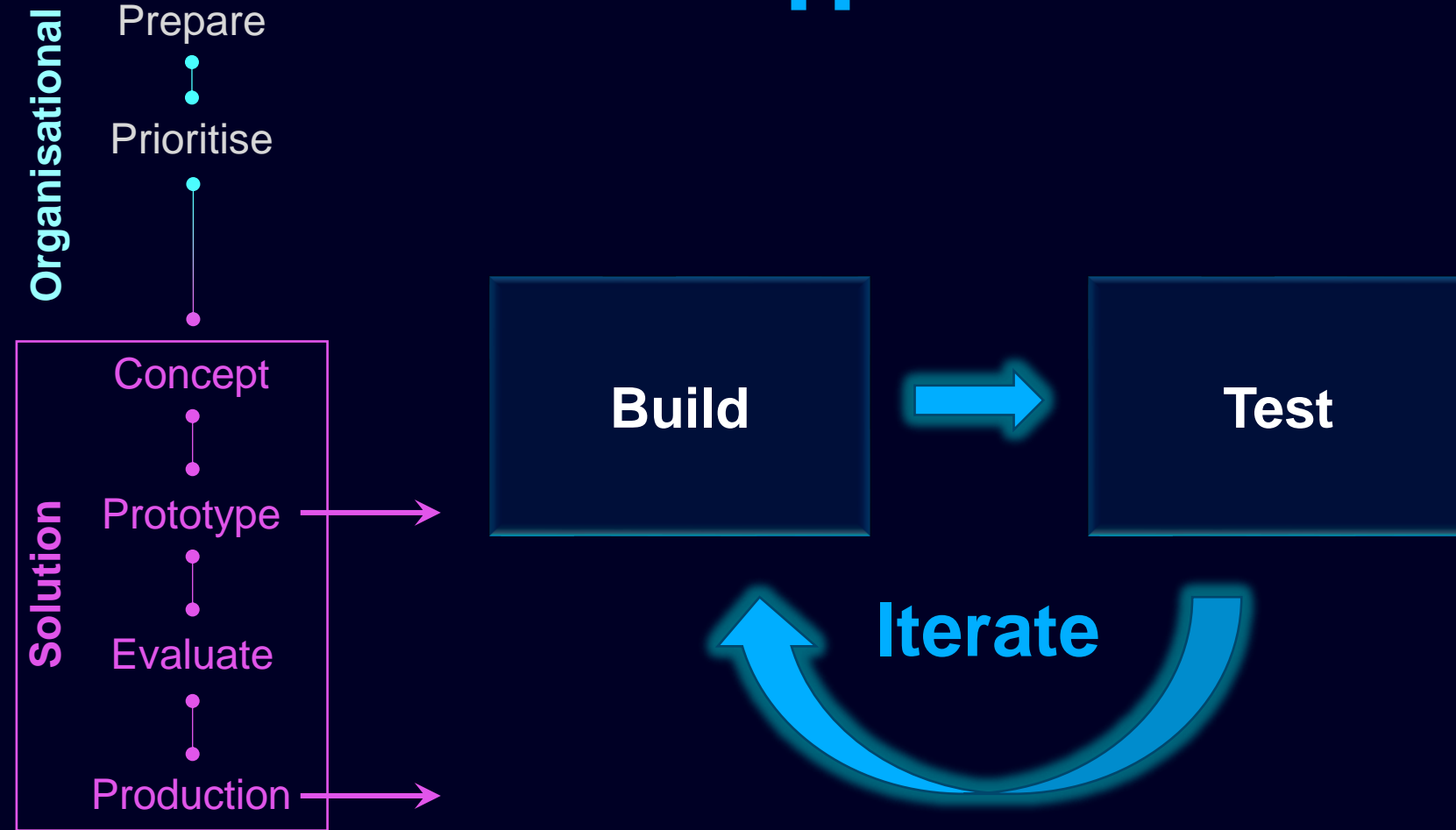
If you would like to discuss deploying agents in your organisation in more detail, you can book a 30-minute consult with our specialists using this [link](#).



Best regards,  
Data#3 Team

*Data#3 - Empowering your business with AI. This email is AI generated.*

# Data#3 Approach



*"Agent Ideas Generator"*  
*Autonomous Agent*



*Explore ideas for agents you can build!*

# AI adoption demands a device strategy!

Choose SURFACE



Productivity  
Shines on Surface



Most Secure  
Most Performant



Copilot  
Hybrid AI

*"Agent Ideas Generator"  
Autonomous Agent*



*Explore ideas for agents you can  
build!*

# Surface brings Microsoft AI to life!



Cloud

Apps

OS

Device

Premium experiences | AI innovation | Business-ready security

*"Agent Ideas Generator"*  
*Autonomous Agent*



*Explore ideas for agents you can  
build!*