

Copilot Agents

Personal Productivity to Process Transformation

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JuiceIT2025

SIMPLIFY
CONNECT
PROTECT

Agenda

- What are Agents?
- Microsoft Agent Landscape
- Agents in Action
 - M365 agents
 - Agent Builder
 - Copilot Studio
- Best Practice Considerations



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

Spectrum of agents

← Simple ————— Advanced →



Retrieval



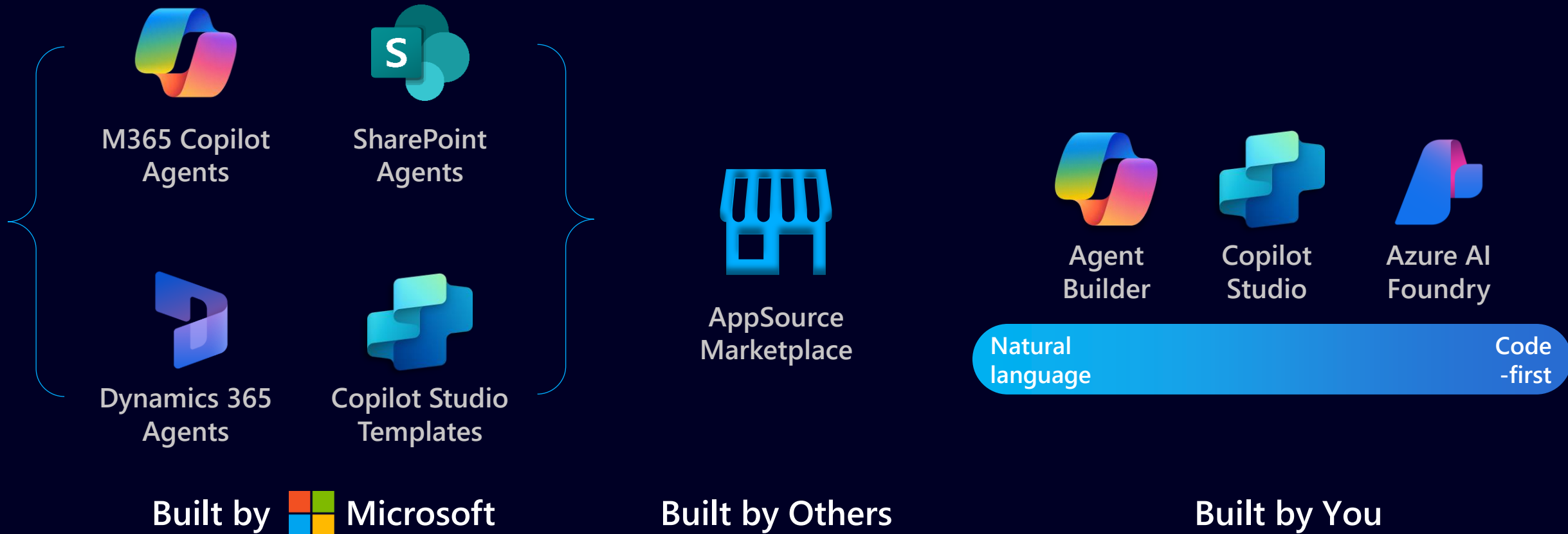
Task



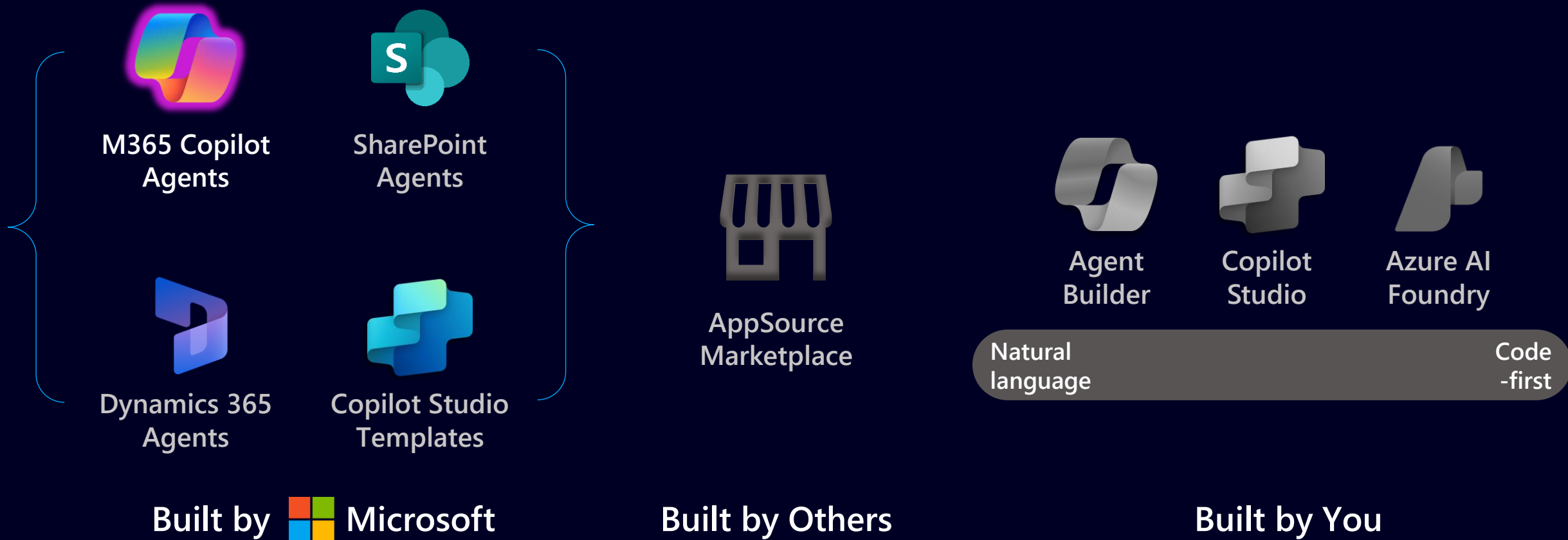
Autonomous

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

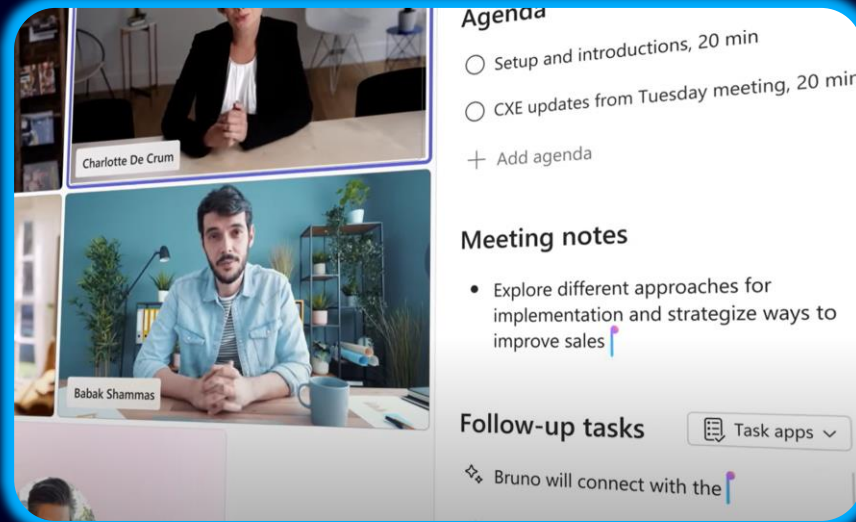
Microsoft Agent Landscape



Microsoft Agent Landscape



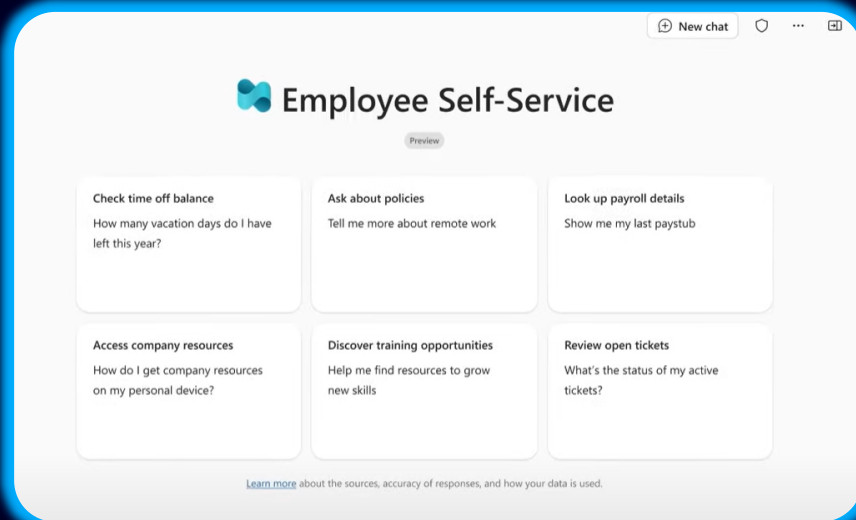
Microsoft 365 Copilot Agents



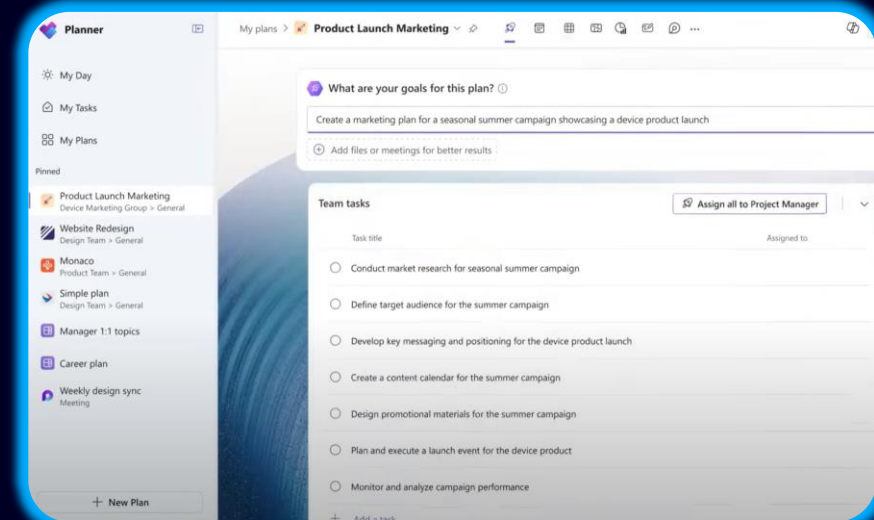
Facilitator



Interpreter

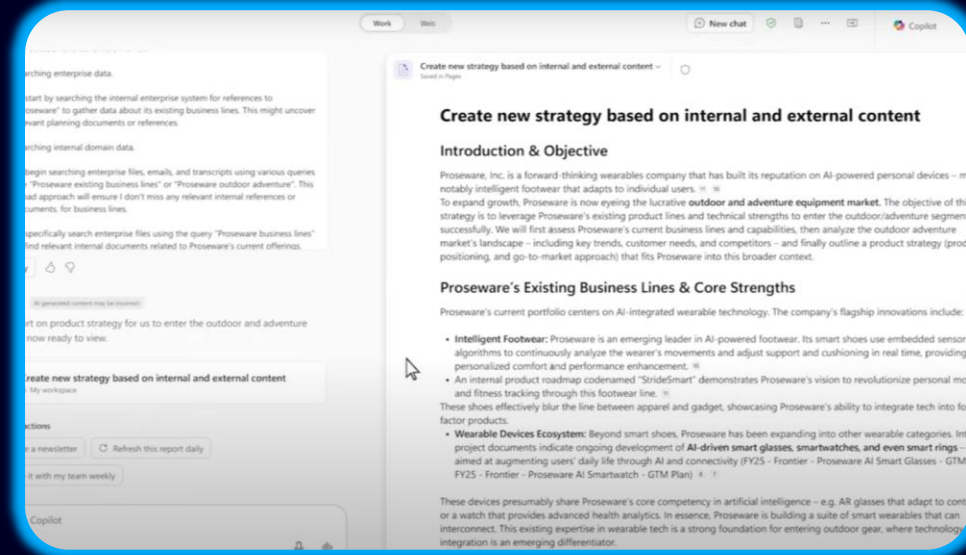


Employee Self-Help



Project Manager

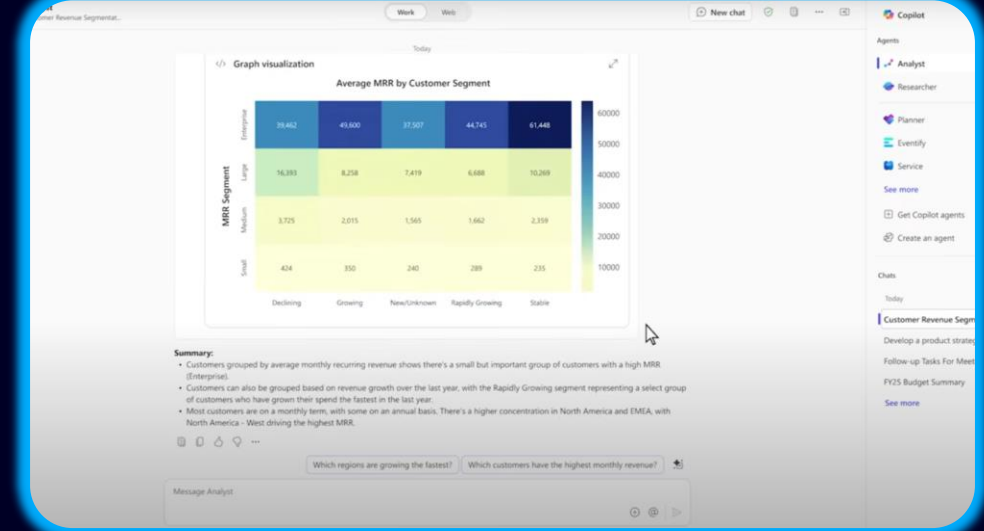
Microsoft 365 Copilot Reasoning Agents



Researcher

Best used for: deep, evidence-based insights across broad topics and sources

- Structured, **multi-step reasoning**
- Comprehensive, **context-rich analysis** from work and web data
- Investigating trends, frameworks, and technologies

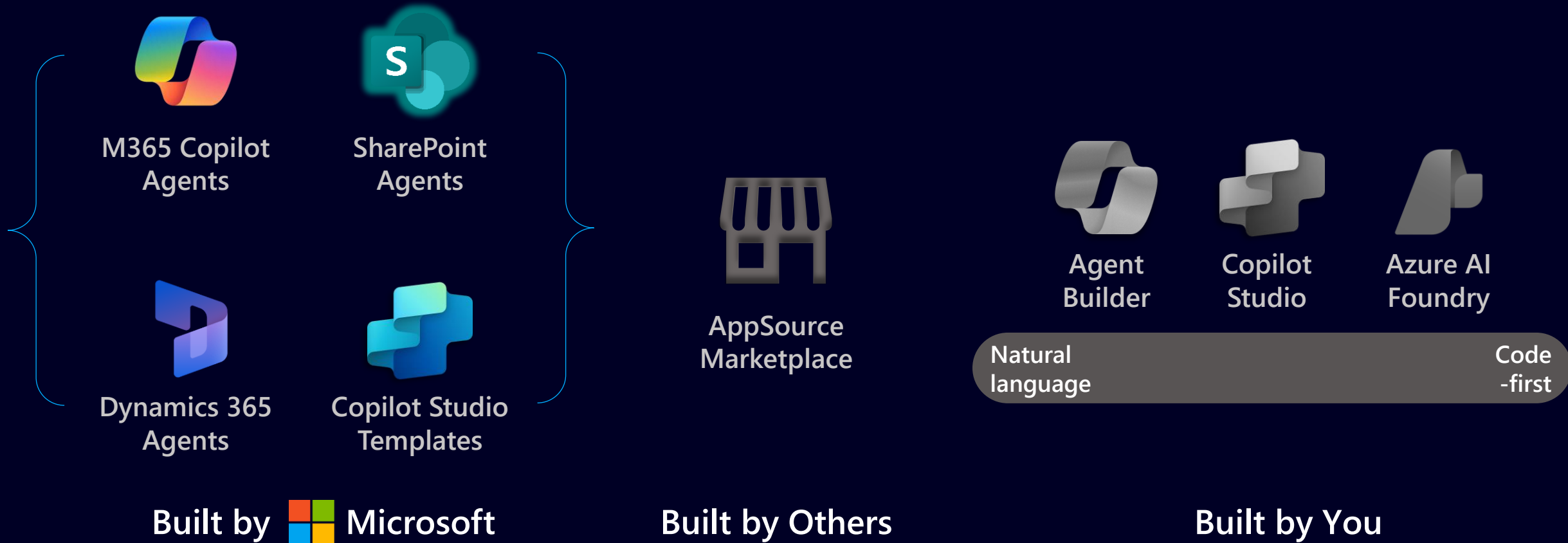


Analyst

Best used for: transforming raw data into actionable intelligence

- Processing large and **complex datasets**
- Advanced **analytical reasoning** (including code execution)
- Robust **visualisations**: forecasts, dashboards, pattern analysis

Microsoft Agent Landscape



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

Microsoft Agent Landscape



M365 Copilot
Agents



SharePoint
Agents



Dynamics 365
Agents



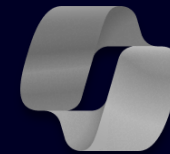
Copilot Studio
Templates

Built by  Microsoft



AppSource
Marketplace

Built by Others



Agent
Builder



Copilot
Studio



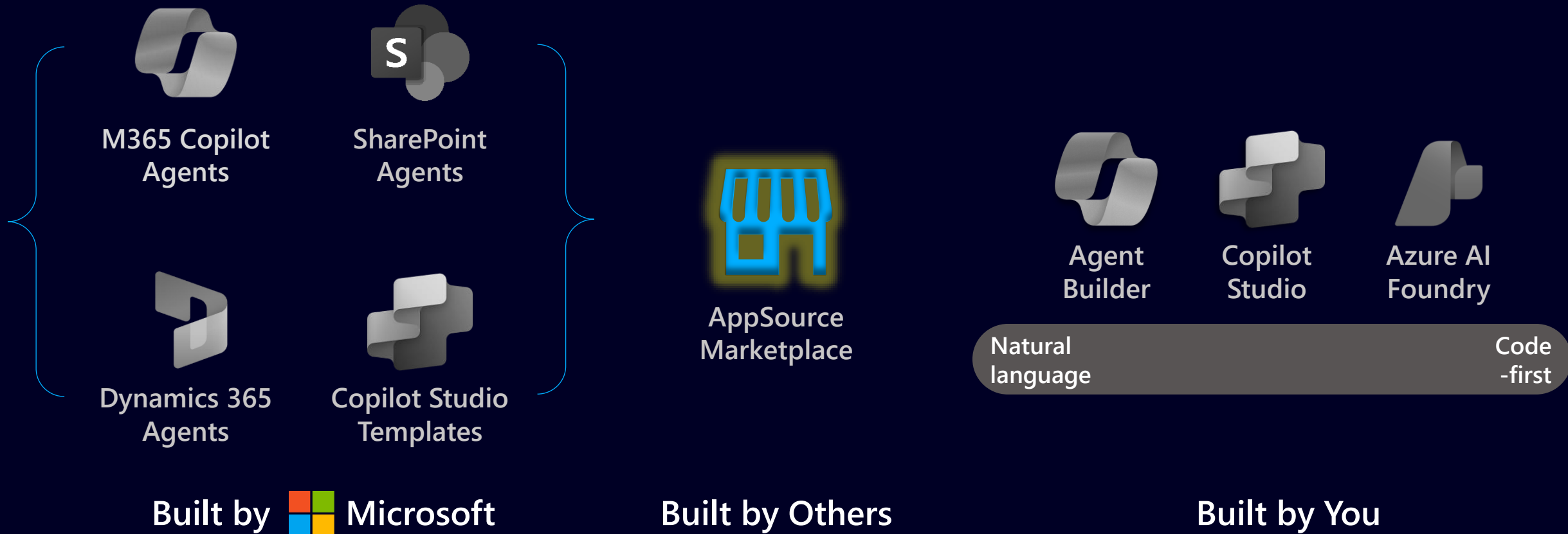
Azure AI
Foundry

Natural
language

Code
-first

Built by You

Microsoft Agent Landscape



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

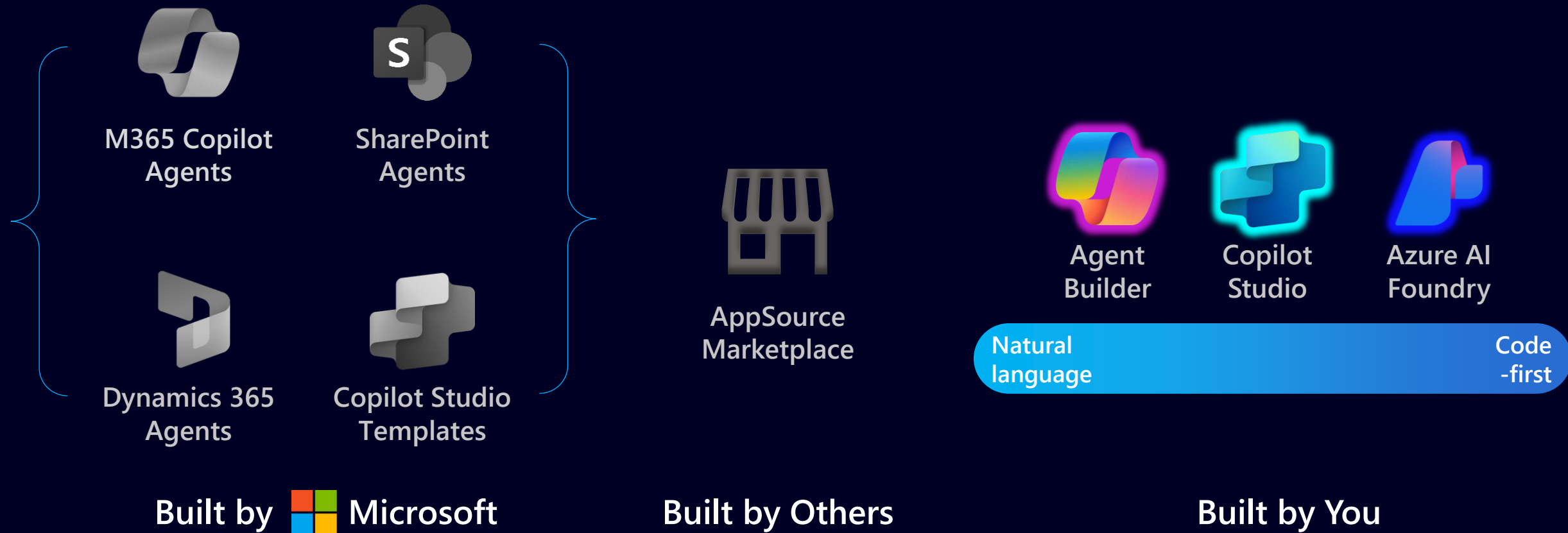
Take ideas from imagination to activation with...

**Confluence Cloud** 
Atlassian.com

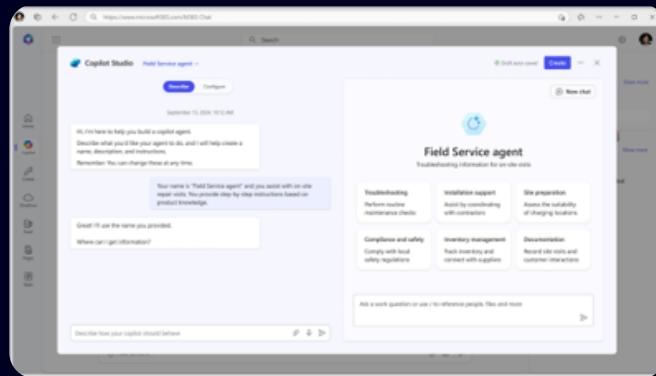
Request

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

Microsoft Agent Landscape



Build your own Agents

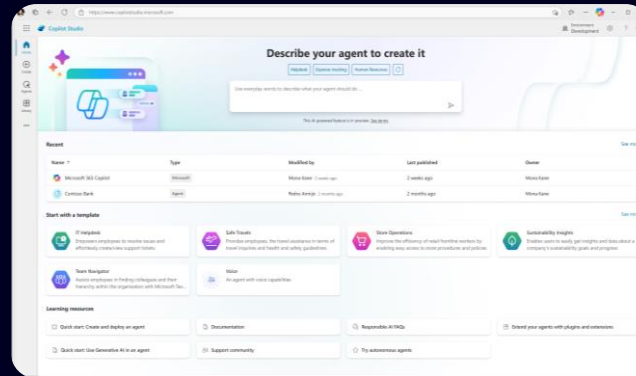


Natural language



Lite Experience
(formerly Agent builder)

For End Users



Full Experience
(Copilot Studio)

For Makers



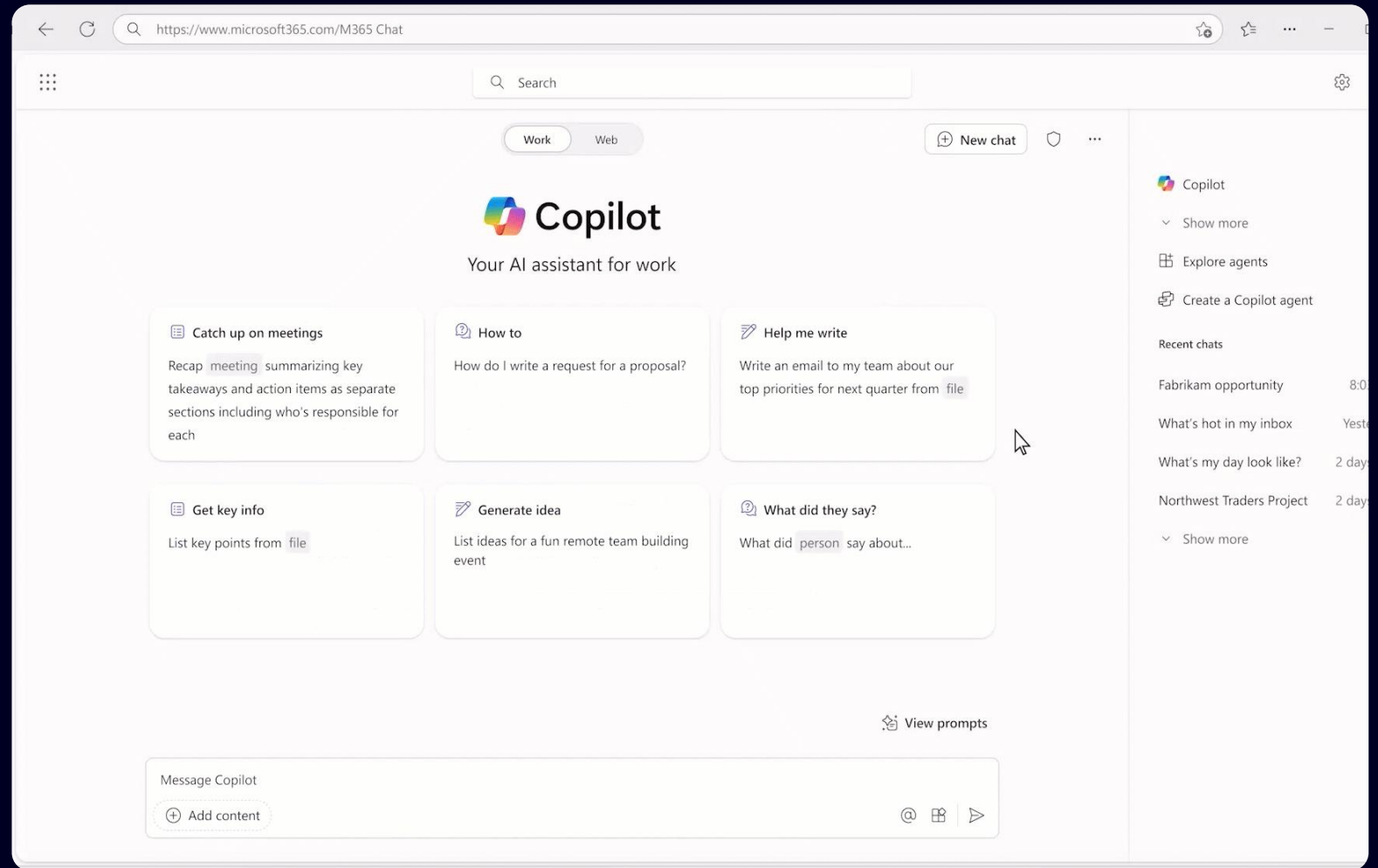
Azure +
Visual Studio / GitHub

For Developers



Agent Builder for End-Users

- Seamlessly integrated into M365
- Easy, **natural language creation**
- Build agents in context without code





Microsoft Copilot Studio for Makers

- Bring your enterprise data, APIs and **knowledge** sources
- Add **tools** (i.e. perform actions)
- Create **autonomous agents**
- Integrate **multiple agents** to handle complex workflows

Describe your copilot to create it

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

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

Recent

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



Logic

Defined conversation paths for your agent to follow when triggered



Tools

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

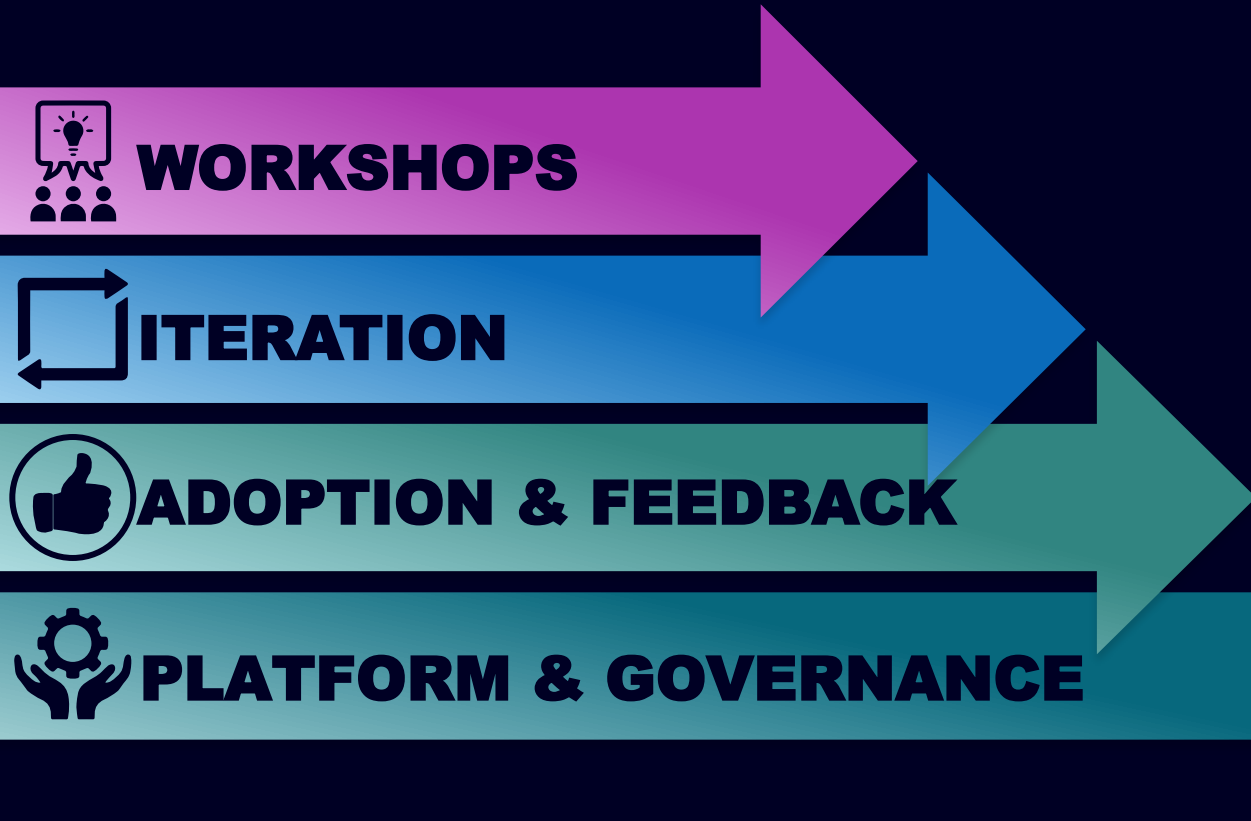


Channels

Where and how your end users engage with your agent



Building Data#3's First Copilot 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**.



Add knowledge

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

Upload file

Drag and drop, or [select to browse](#), or upload and sync from

OneDrive

SharePoint

Helps your agent access knowledge from remote file locations. [Learn more](#)

★ Featured

⌵ Advanced

☰ See suggestions

Public websites

SharePoint

Azure AI Search

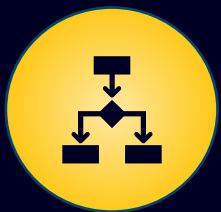
Dataverse

Dynamics 365

Salesforce

ServiceNow

Azure SQL

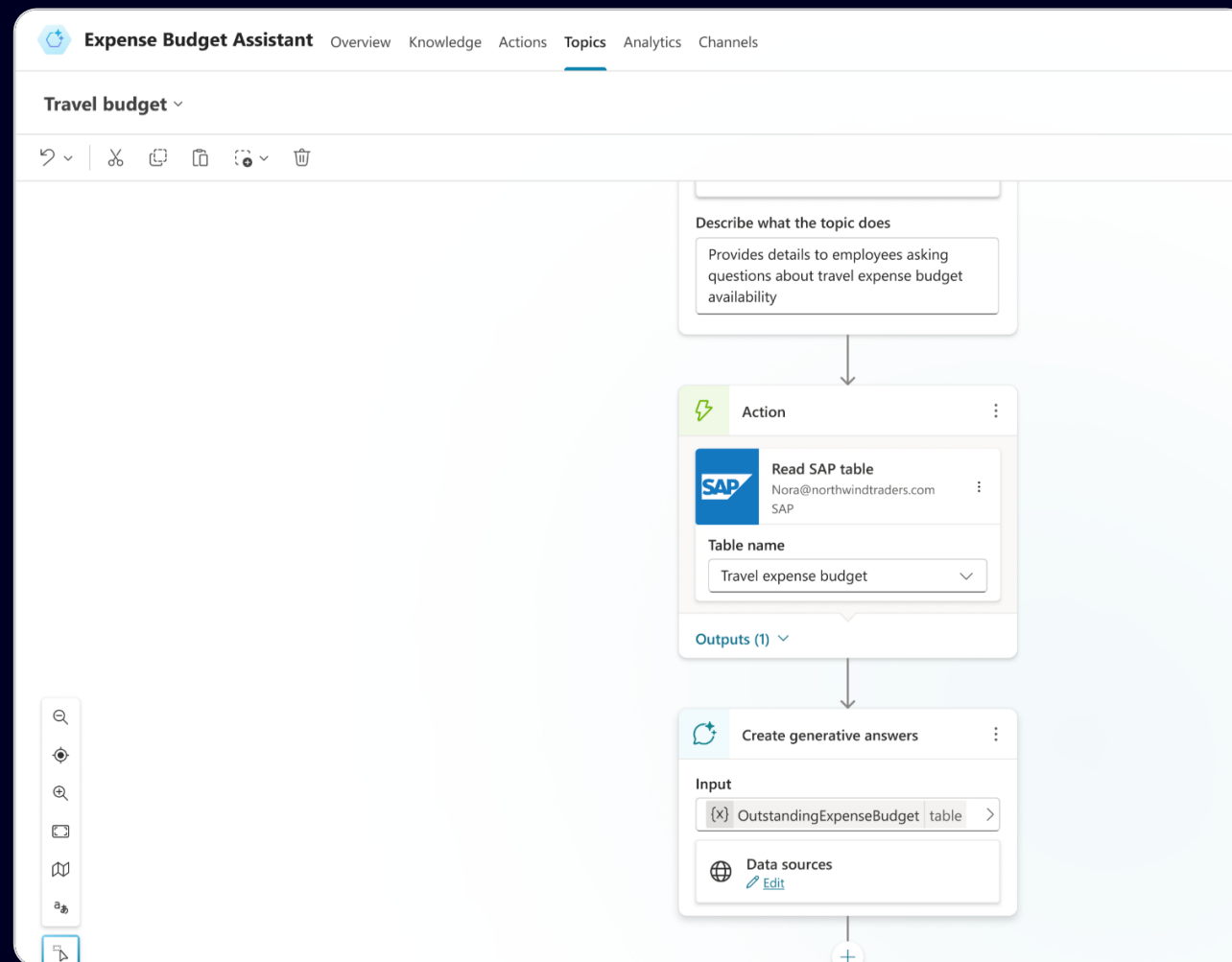


Logic

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.

Hand off the conversation with full context to a person.





Tools

Easily connect to your key systems.

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

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



Add tool

Let your agent do more. [Learn more](#)

Search for a tool

Suggestions



Lists all public repositories
GitHub

Lists all public repositories for an organization.



Generates a xwsse header
WorkPoint

Generates a xwsse header to use for digital signature



Remove selected repository from an organization secret
GitHub

Removes a repository from an organization secret when the `visibility` for repository access is set to `selected`. Th...

All

★ Featured

Connector

Flow

Model Context Protocol

+ New tool



Excel Online (Business)
Connector



Microsoft Dataverse
Connector



Microsoft Teams
Connector



Office 365 Outlook
Connector



Office 365 Users
Connector



OneDrive for Business
Connector



Planner
Connector



ServiceNow
Connector



SharePoint
Connector



Channels

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

Add your agent to an existing or custom app via Teams, Power Pages, etc.

You can access even more channels through ISVs, including:



WeChat



WhatsApp
through Twilio



Google's Business
Messages



Apple Messages
for Business



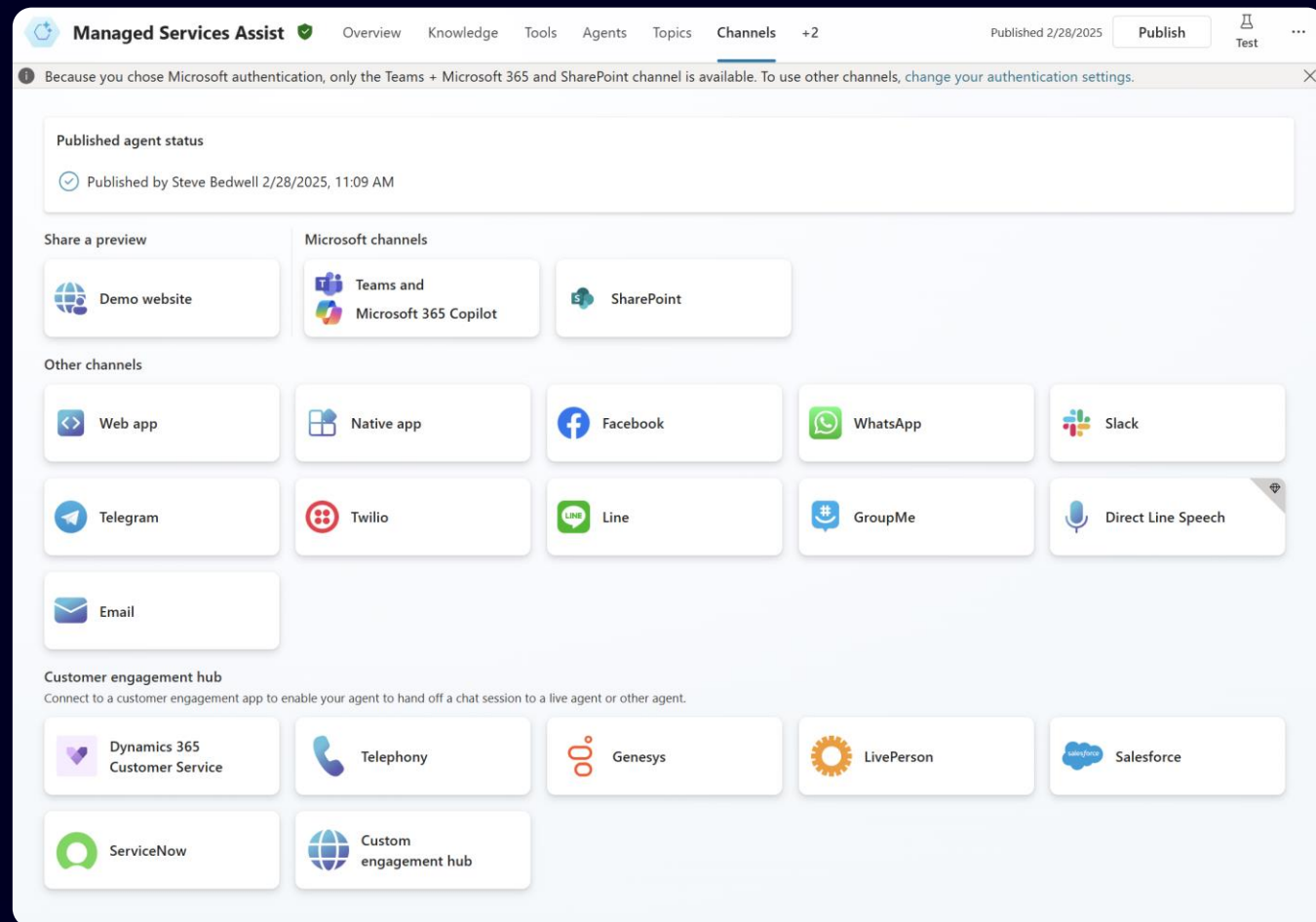
Azure
Communication
Services



TeleSign



Custom



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?



Agent Lifecycle

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

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

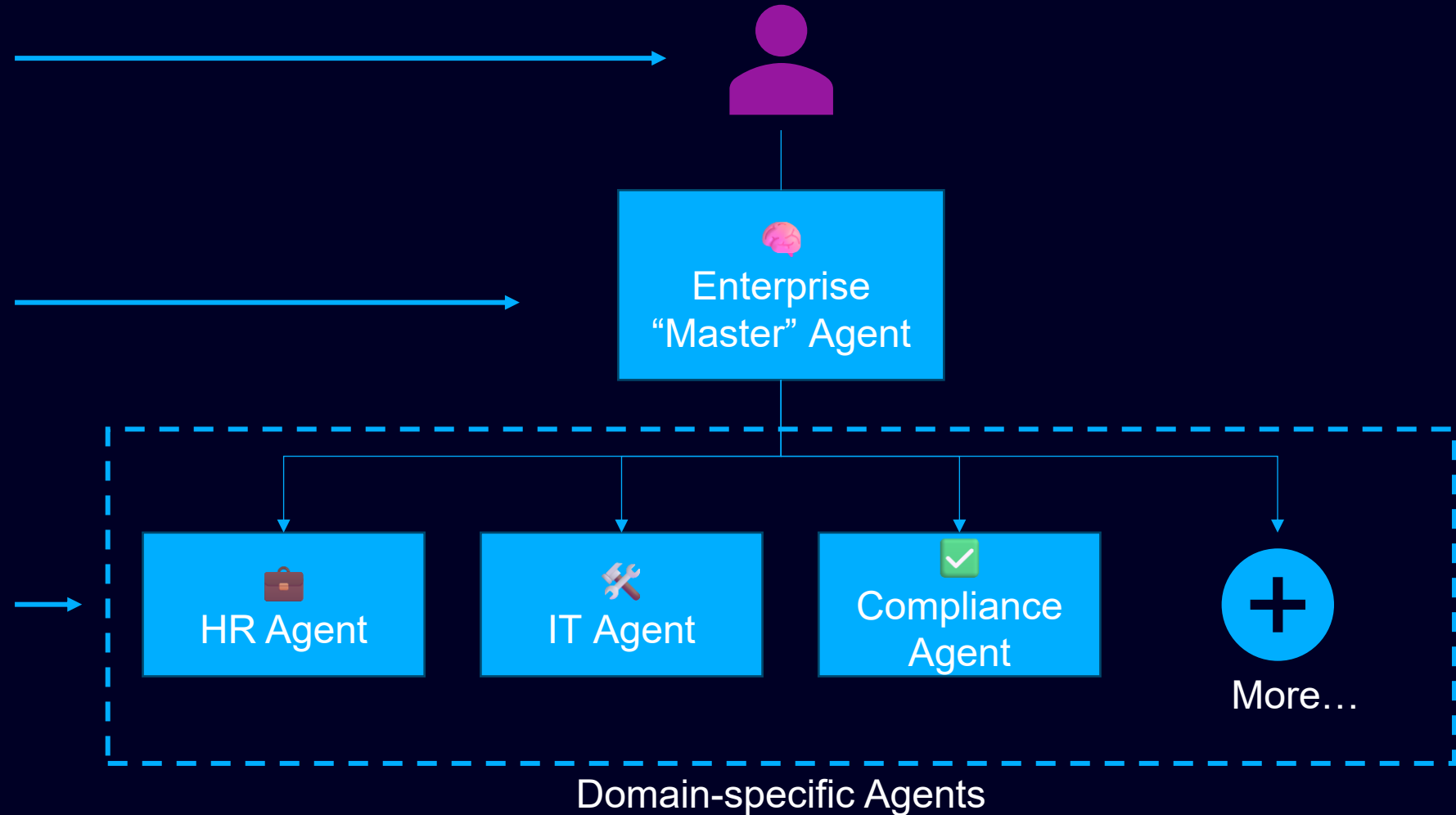
Multi-Agent Orchestration

Example – “Master” agent for the Enterprise

 Single entry point for users via “Master Agent”

 Detects the user’s intent

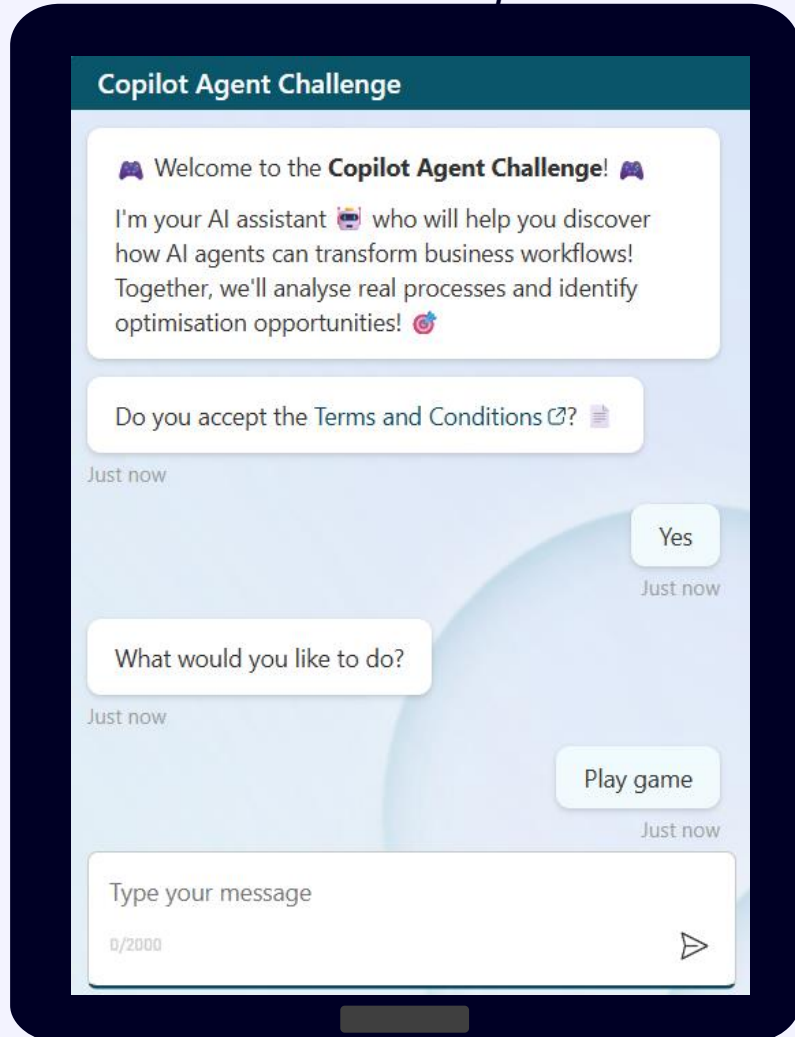
 Intelligently routes conversation to the appropriate domain-specific agent



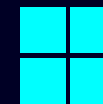
Visit **Data#3 Modern Work Stand** for tips!



Thank You



Take the **Copilot Agent Challenge** for a chance to win! 🏆



Find us as the **Microsoft Stand** Copilot & Agent demos! 🚀



Try an autonomous agent: **Agent Ideas Generator** 💡