



Researcher & Analyst Adoption

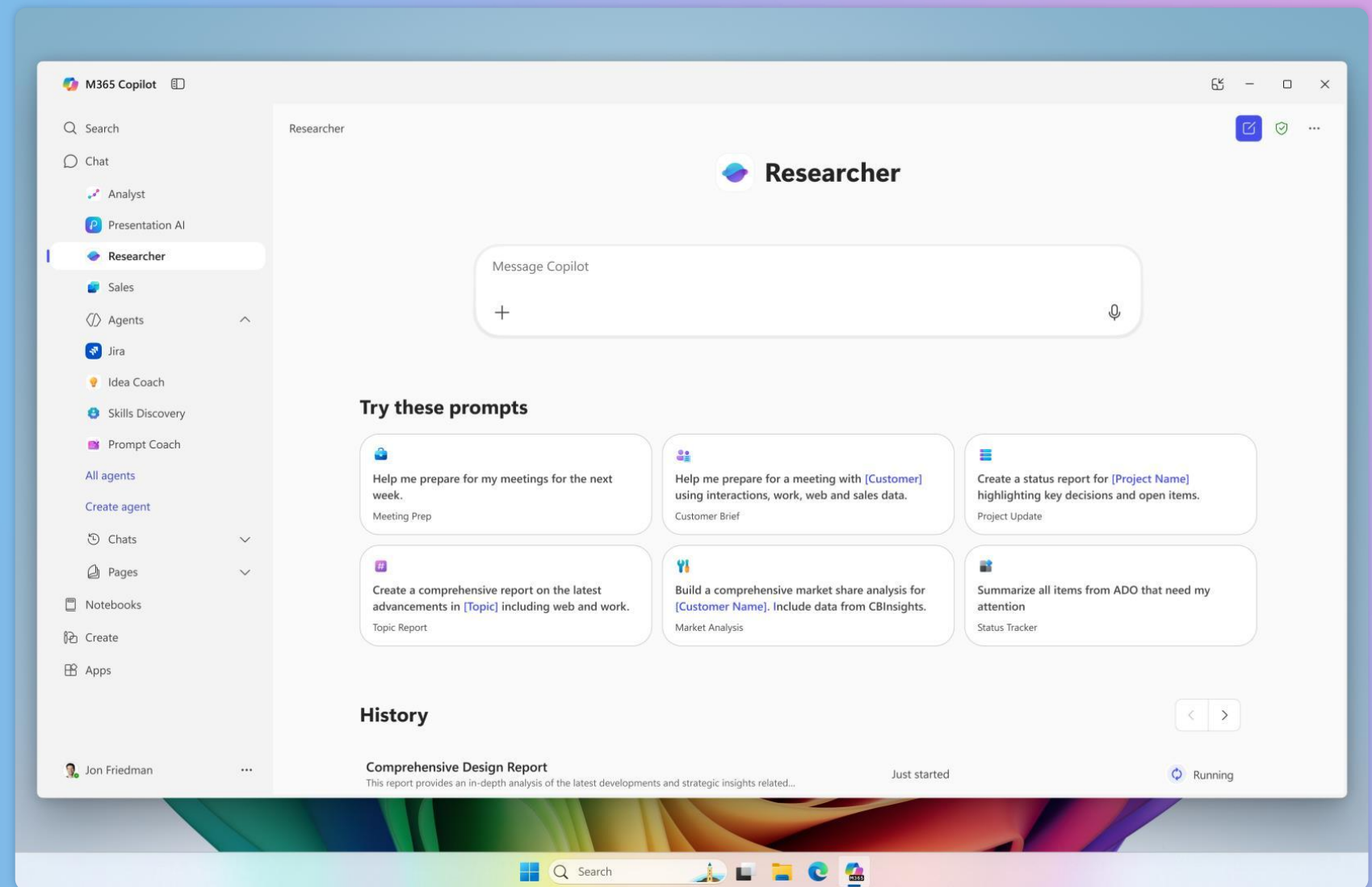


Researcher agent

The Researcher Agent gives organizations the capability they would expect from a highly paid strategist or researcher.

By combining the most advanced deep reasoning models with web and work-grounding from Copilot Chat, this agent provides well-reasoned responses to complex prompts with the most relevant data.

Users gain a thought partner that can perform advanced reasoning grounded in their unique context.



Turning data into value is only limited by the intelligence applied to it

The data: Organizations and users have access to more data than ever, from companywide SharePoint sites to the last chat or email you sent.

Transforming data into value: One of the superpowers of humans has been to internalize large amounts of this highly unstructured data, apply intelligence to it, and turn it into organizational value.

Transforming data into value with GenAI: Generative AI tools like Copilot Chat transformed how we brought digital tools into the workplace, by bringing an organization's data to the models capable of applying complex reasoning to it.

Addressing the most complex questions and challenges with Researcher: But for the most complex, most strategic questions, it's not simply a matter of finding information and running it through an AI model; instead, what's needed is to first create an execution plan, then internalize as much information as needed to "understand" the problem. Then iteratively work with as much internal and web-based data as needed to create a detailed, comprehensive, high-value report.

For situations that require in-depth research using complex and/or many sources and the ability to apply advanced reasoning skills to all that data, Researcher is a new tool that supports everything from board-level strategies to complex project management. It not only accelerates work but allows individuals to do the work they'd previously rely on experts to perform.



Connecting the data that matters most with the most capable models

Knowledge workers rely on **two types of data**:

Work Data

The proprietary data that a user has access to, from emails and call transcripts to SharePoint sites and databases.

Web Data

Publicly available data that helps define the current state of the world.

Copilot Chat relies on the latest large language models to quickly search work and web data sets and provide rapid quick, concise answers.

Retrieval Augmented Generation

Copilot Chat uses a tool called Retrieval Augmented Generation to search across all of a user's data – and the web – to extract the items most relevant to the question asked.

Researcher builds on Copilot Chat with a new class of models – advanced reasoning models – to create a research plan, execute it, and build more comprehensive, complex, and exec-ready reports.

Chain of Thought

In response to a prompt, Researcher uses recursive reasoning to understand a task, perform research, and create a report.

Research

Researcher is built on a model that's been taught to think like a professional researcher.

How to use Researcher



Start a new report

You can begin by typing in a research topic or question into Researcher's prompt box. For example, you might ask: *"Give me a research report on the impacts of AI in healthcare."* You can also use any suggested prompts or templates provided on the Researcher home screen. These suggestions can help inspire what to ask.



Answer clarifying questions

Once you submit your query, Researcher will ask you a set of clarifying questions. You can choose to answer these questions or just type "Go ahead."



Wait for the report to compile

Researcher will work through each step, fetching information and analyzing it. This may take some time depending on how complex the query is. You can watch the progress in real-time, or you can go do other work. Researcher will show all the steps it's taking as it creates your report.



View the results

Once complete, you will see a structured report with the findings. The report might have sections that summarize different aspects of the topic and often includes context like where information came from (for example, referencing a specific document or stating the source of a statistic). This context helps you trust and verify the information.



Take action on the report

Finally, you can utilize the follow-up actions. For example, if you need to edit the report, click **"Edit in Pages"** and the report is shown in a side-by-side view. Once opened in Pages, the report gets saved automatically.

Where can you use Researcher

- Researcher is accessible as an agent in Copilot Chat in the Microsoft 365 Copilot app, Teams, and Outlook.
- Start from [Copilot | Microsoft 365 Copilot](#)
- View the left navigation pane
- Click on Researcher

Turning on Researcher

- The agent will appear in the Agent Store under 'Built by Microsoft' located within the 'All agents' and 'Get agents' landing page.
- For users with a Microsoft 365 Copilot license, Researcher and Analyst agents are pre-pinned for all eligible users.








Microsoft 365
Copilot

Researcher

Example use cases for Researcher agent

Try it! Researcher Agent

	Sample Query	Sample Output
 Project Status	"Give me a detailed history and current status update on Project Alpine and identify all key decisions and open questions. Focus on [meetings / files /etc.]"	Researcher will gather emails, meeting notes, documents, and any SharePoint pages about that project and summarize the timeline and current state.
 Client Prep	"Prepare a report for my upcoming meeting with Fabrikam Co. My goals for this meeting are..."	Researcher will pull the last interactions with Fabrikam, recent news about them, and relevant product info
 Industry Research	"What are the latest trends in cybersecurity and how might they impact our business? Focus on [product / project / etc.]"	It will consult internal reports in your organization's knowledge base as well as external articles to produce a trend report.
 Competition Analysis	"Brief me on Company X's recent announcements and our internal insights on them."	Combining web/news data about Company X with any internal analysis or emails that discuss Company X
 Personal Productivity	""Help me prepare for my week. I want to..."	A report that outlines your upcoming meetings, deadlines, and pulls in any materials you should review for each, essentially a personalized weekly game plan.

Scenario Library

Get ideas on how to integrate Researcher into your business processes.

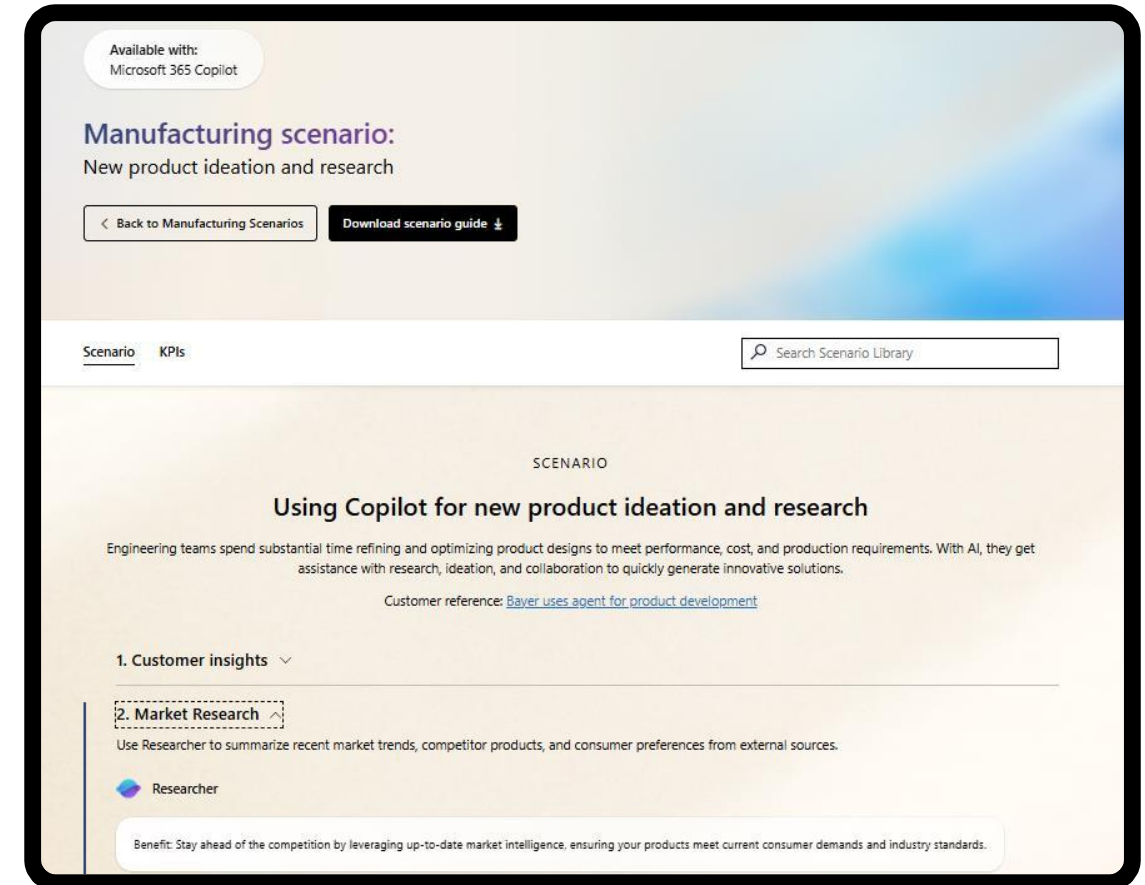
[New product ideation and research](#) – use Researcher to create a report on market trends, competitor products, and consumer sentiment. Then combine market research, project information, and meeting notes into a report on new product ideas.

[Streamline market research and strategy](#) – use Researcher to create a market research report from internal and external sources.

[Data strategy and insights](#) – use Researcher to propose a strategy for how to monetize data streams.

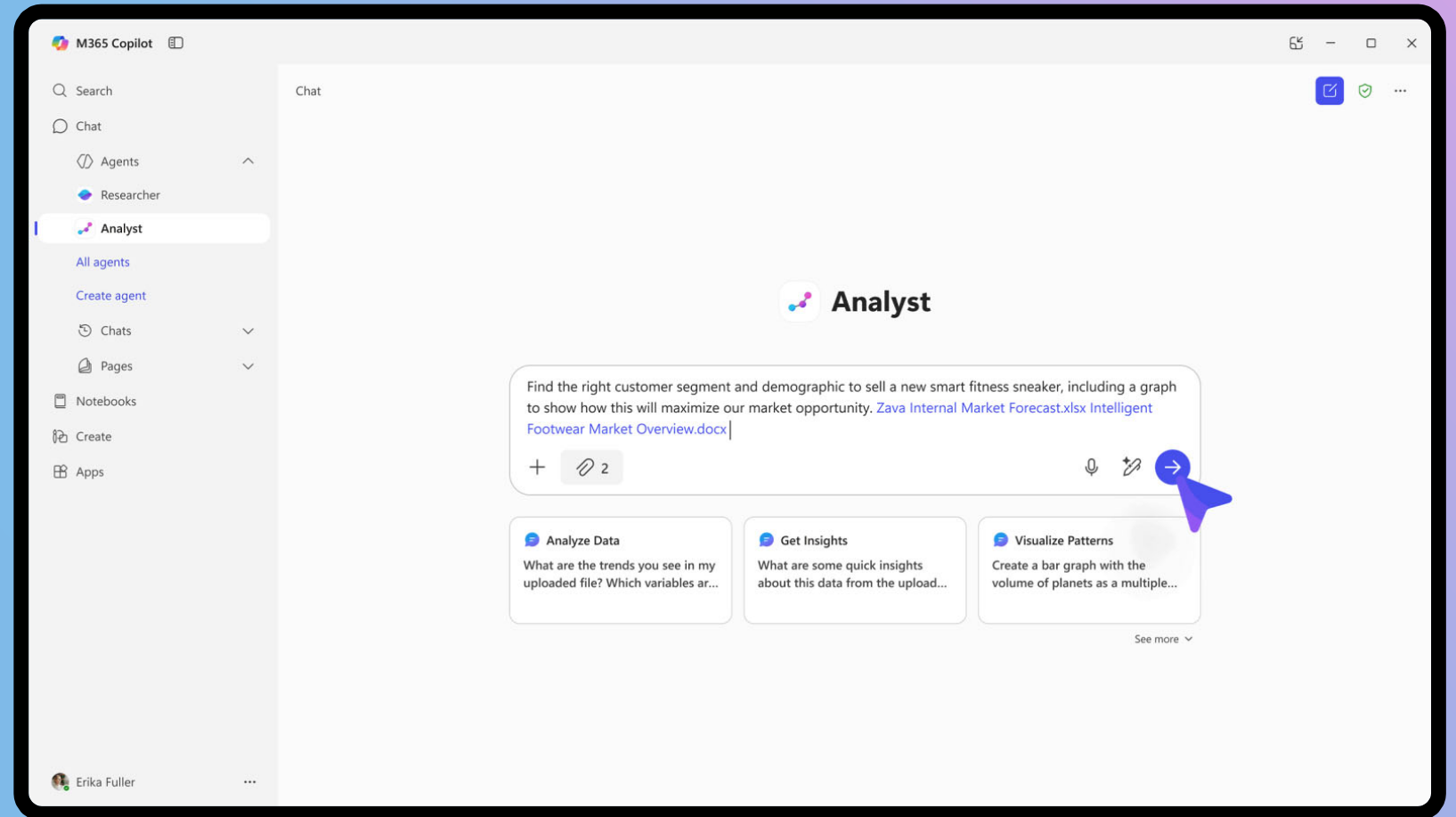
[Create an unsolicited proposal](#) – use Researcher to better understand a customer's business challenges and strategies before proposing new services. Then use Researcher to create a strategy for using your solution to improve the customer's business.

[Draft a product strategy document](#) – use Researcher to create a proposal for a new IT solution.



Analyst agent

is an advanced reasoning agent that uses iterative chain-of-thought reasoning for advanced data analysis – turning raw data to insights in minutes with the power of OpenAI's o3-mini model.



Challenges in data analysis



Data overload: Organizations are inundated with structured and unstructured data from countless sources—spreadsheets, databases, CRM systems, and more. This volume of data can overwhelm teams and make it difficult to extract timely, actionable insights.



Skill gaps: Extracting value from complex data often requires technical expertise—SQL, Python, BI tools—that many knowledge workers lack. This creates bottlenecks and reliance on specialized data analysis roles.



Time-consuming workflows: Disproportionate time is often spent cleaning, formatting, and stitching together messy data. This manual effort delays insights and increases the risk of missed opportunities.



Fragmented tools and silos: Data lives in disconnected systems—Excel files, reporting systems, internal dashboards—making it hard to get a unified view. We often must jump between tools, losing context and efficiency.



Inaccessible insights: Even when insights are generated, they're often buried in complex dashboards or static reports, making it difficult to interpret results or ask follow-up questions.

How does Analyst work?

Unlike traditional large language models that jump too quickly from problem to proposed solution while often failing to adjust to new complexities or gracefully recover from mistakes, Analyst:

- Implements a reasoning-driven, chain-of-thought (CoT) architecture derived from OpenAI's o3-mini.
- Progresses through problems iteratively by hypothesizing, testing, refining, and adapting. Analyst takes as many steps as necessary, adjusts to each complexity it encounters, and mirrors human analytical thinking.

With the capability to generate and execute code at every step within its reasoning trajectory, this model excels at incremental information gathering, constructing hypotheses, course correction, and automatic recovery from errors.

Predict future revenue and expenses based on these past earnings reports and help me visualize the forecast. [Historical Earnings Reports.xlsx](#)

Analyst

Activity References

Import data

Visualizing future trends

Understanding sheet structure

Mapping data structure

```
1 import pandas as pd
2
3 df = pd.read_excel('/mnt/data/ .
  HISTORICAL_EARNINGS_REPORTS.xlsx')
4 print(df.head())
5 print(df.columns.tolist())
6 print(df.dtypes)
```

Loading the workbook

Calculating revenue trends

Analyzing revenue trends

Piecing together the puzzle

Verifying fiscal data

Assessing financial metrics

Summing up expenses

Visualizing forecasts

Piecing together

Summing up figures

Charting the forecast

```
1 import numpy as np
2 import matplotlib.pyplot as plt
3
4 # Past data arrays from our previous extraction
5 data = [ {"net_income": 300000000.0, "year": 2023, "revenue":
  540000000.0, "expense": 240000000.0}, {"net_income":
  250000000.0, "year": 2022, "revenue": 480000000.0, "expense":
  230000000.0}, {"net_income": -50000001.0, "year": 2021,
  "revenue": 360000001.0, "expense": 410000002.1},
  {"net_income": -100000001.1, "year": 2020, "revenue":
  360000001.1, "expense": 461000002.2}, {"net_income":
  -150000001, "year": 2019, "revenue": 264000001, "expense":
  415400002}, {"net_income": -200000001, "year": 2018,
  "revenue": 264000001, "expense": 465400002}, {"net_income":
  -250000001, "year": 2017, "revenue": 264000001,
  "expense": 515400002},]
```

Synthesizing insights

Charting patterns

Finalizing predictions

Sharing results

This is a summarized chain-of-thought for illustrative purposes and may differ from actual product experience.

How to use Analyst

How to use Analyst

- Find the file(s) with the raw data you need help analyzing and add it to your prompt in Copilot Chat, either by uploading directly or selecting from your M365 files.
- Analyst currently supports up to 5 files at once across multiple formats including documents (Word, PPT, PDF) and datasets (Excel, CSV, JSON).
- Ask Analyst to provide the insights you're looking for, including specifying the type of visualization or graph.
- Analyst will then work to understand the data, construct a plan, and execute Python code to reason over your prompt.
- This process may take a few minutes and you can follow along with chain-of-thought reasoning to check its work.

Where can you use Analyst

- Analyst is accessible as an agent in Copilot Chat in the Microsoft 365 Copilot app, Teams, and Outlook.

Turning on Analyst

- The agent will appear in the Agent Store under 'Built by Microsoft' located within the 'All agents' and 'Get agents' landing page.
- For users with a Microsoft 365 Copilot license, Researcher and Analyst agents will be pre-pinned for all eligible users.



Microsoft 365
Copilot

Analyst

Example use cases for Analyst agent

When to use Analyst

When to use Analyst

- **Consulting multiple data sources:** Gathers and integrates data from different file types for comprehensive analysis.
- **Step-by-step problem solving:** Progresses through challenges by hypothesizing, testing, and adapting responses, making it useful for iterative decision-making.
- **Visualizations:** creates key visualizations for data analysis and presentation.

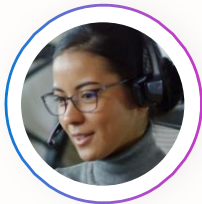
Example use cases

- Financial performance analysis and forecasting
- Customer segmentation analysis
- Sentiment analysis over survey or feedback data
- Data storytelling with visualizations

Best practices for using Analyst

- Upload both structured (Excel, CSV, JSON, etc.) and unstructured (PDF, Word, PowerPoint etc.) data files, up to 5 files at once
- Ask complex, multi-variable questions that require advanced data analysis
- Specify the type of insight or visualization needed
- Review chain-of-thought and Python generated insights for accuracy

Try it!



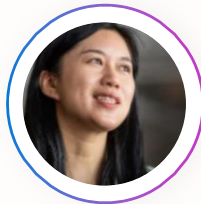
Customer Service



Sales



Finance



Marketing



HR

Pain point	Lack of visibility into customer service trends and feedback	Lack understanding of pipeline health and probability of meeting quarterly or year-end close targets	Strategic decisions require complex modeling across multiple business drivers	Limited understanding of campaign insights	Managers need to generate and modify team strategies while quickly assessing project performance for clarity and continuous improvement
Scenario	Gain visibility into larger trends and patterns of customer feedback	Gain real-time visibility into pipeline trends and sales performance	Analyze P&L, market growth, and cost structure data to evaluate the financial impact of launching a new product line	Gain insights into efficacy and outcomes of marketing levers and investments	Co-create and draft team strategy based on team goals and expected outcomes and use lessons learned to feed a continuous improvement loop
How Analyst can help	Use Analyst to understand sentiment across customer reviews and comments	Use Analyst to analyze data to determine sales targeting opportunities	Use Analyst to simulate financial outcomes, compare scenarios, and generate decision-ready insights for leadership.	Use Analyst to understand marketing results data (e.g. SEO, web traffic, conversion rates, etc.) to determine investments	Use Analyst to assess project outcomes for effectiveness, timeliness, and other metrics

Scenario Library

Get ideas on how to integrate Analyst into your business processes.

[Improve merchandising decisions](#) – use Analyst to help define sales targets based on historical data, market trends, and business goals.

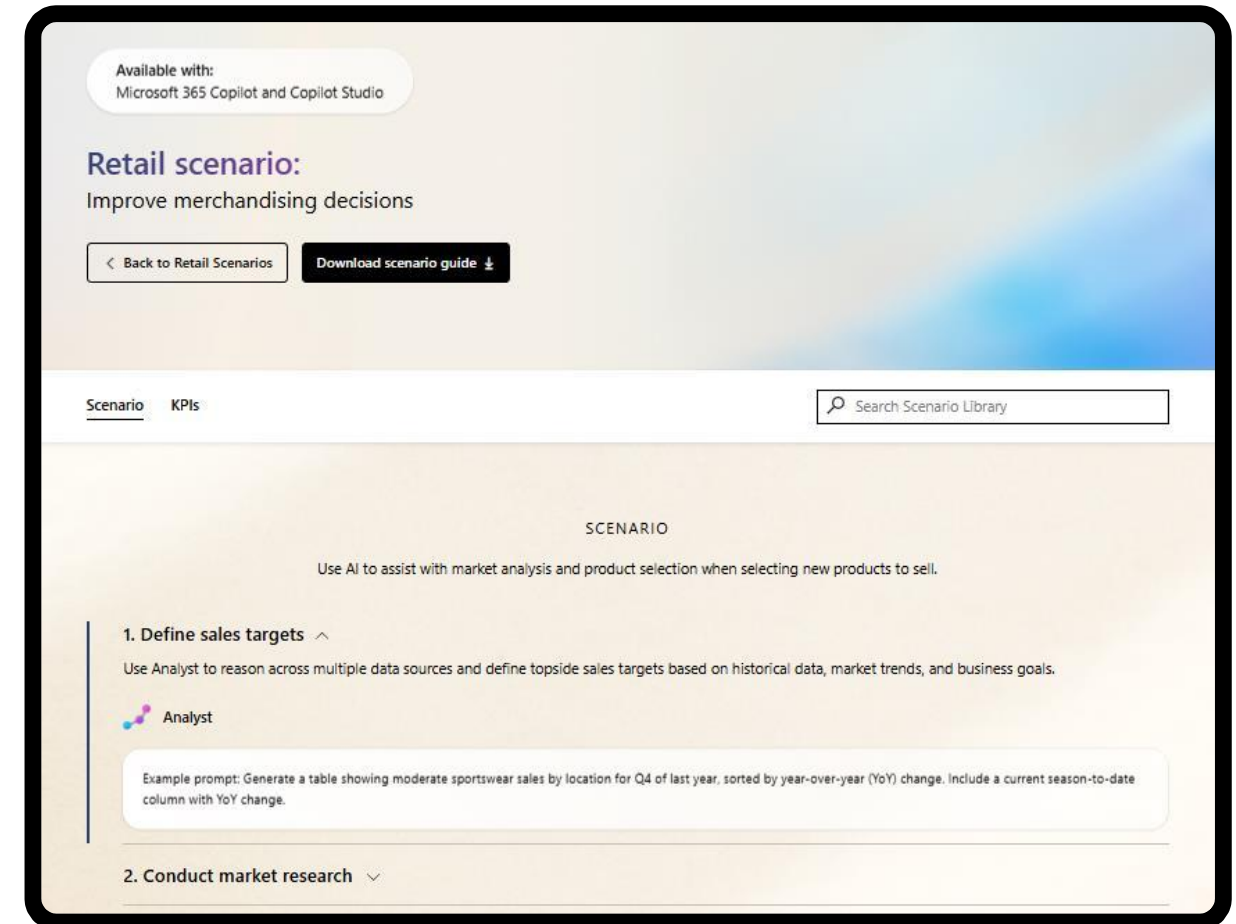
[Implement adaptive pricing](#) – use Analyst to identify sales trends and compare pricing options.

[Data strategy and insights](#) – use Analyst to gain insights into data streams.

[Intelligent sales forecasting](#) – use Analyst to analyze sales and market data to create forecasts.

[Financial insights](#) – use Analyst to gain deeper insights into sources of revenues and costs.

[Deliver insights to managers](#) – use Analyst to produce reports on manager strengths and development opportunities.



Resources



Read the announcement blog and view the demos:
[Blog: Researcher and Analyst are now generally available](#)

[Video: Explore Researcher and Analyst agents and the Agent Store](#)



Check out the Agents in Microsoft 365
[adoption page](#)



Learn more from our engineering team:

- [Researcher agent in Microsoft 365 Copilot | Microsoft Community Hub](#)
- [Analyst agent in Microsoft 365 Copilot | Microsoft Community Hub](#)