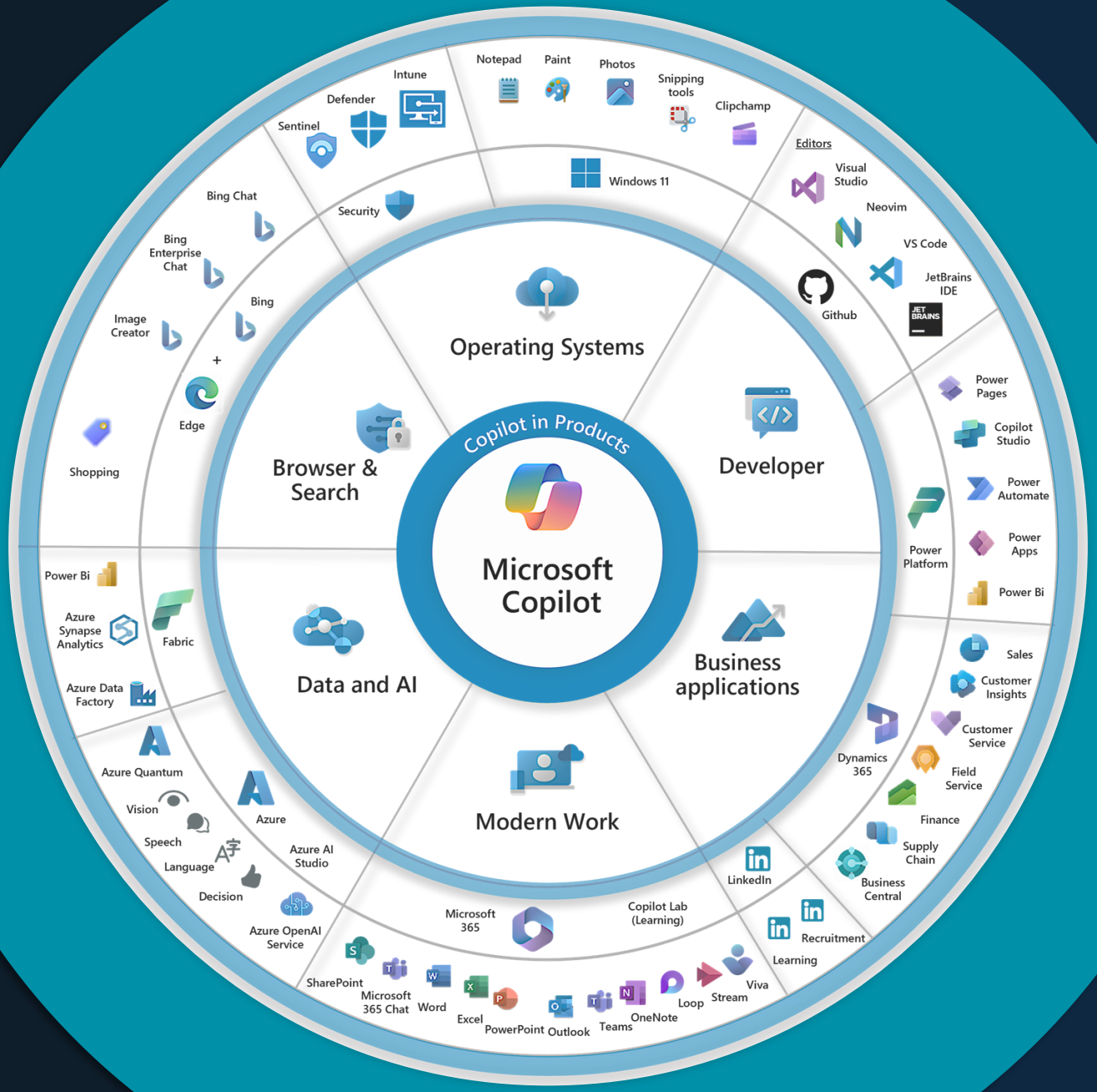
Copilot Studio

Unleashing Creativity and Crafting Custom AI Solutions with Copilot Studio

Joe Alexander
Power Platform - Sr. Technical Specialist

“You gotta know what a crumpet is to understand cricket….”

Copilot experiences across the ecosystem



What is a copilot?

An experience using generative AI to assist humans with complex cognitive tasks.

Chat using natural language (and code)

You determine, guide, and approve the output

Its value increases with complexity

Copilot

Your everyday AI companion available on **web, mobile, and Windows**

Sign in

Hi! Copilot here.
What's on your mind today?

Message Copilot

Write a first draft | Get advice | Learn something new | Create an image

Make a plan | Brainstorm | Practice a language | Take a quiz

Copilot may make mistakes. By interacting with Copilot, you agree to the Terms of Use. See our Privacy Statement.

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Copilot

Your everyday AI companion available on **web, mobile, and Windows**

M365 Copilot

Your Copilot for Personal Productivity (M365 apps like Teams, Outlook, Word, etc.)

Copilot for Microsoft 365

Natural Language

Large Language Models + Microsoft Graph - Your Data - + Microsoft 365 Apps + The Internet

Microsoft 365 Copilot

Home
Copilot
Pages
Create
OneDrive
Apps

Work | Web

New chat

Copilot

Catch up on a meeting
Recap
D365 POD Call for West
MSIT

Prep for that meeting
Help me prepare for
Discover Day Americas

Make it stand out
Suggest a few subjects for the following email: [paste email body here]

Let's wrap up
Recap my day
MSIT

Kickstart a draft
Draft an email to person about...
MSIT

Boost your knowledge
Help me learn about [topic]

View prompts

Message Copilot
Add content

Copilot

Agents
- Visual Creator
- Writing Coach
- RFP Analysis Expert
- Idea Coach
- Prompt Coach
- Get agents
- Create an agent

Recent chats
- what activities have I complet 1/22
- I need to patch a record in mi 1/8
- Why doesn't this power apps co 1/6
- Why doesn 1/6
- What powerpoints do I have on 12/12

See more

Home
Copilot
Pages
Actions
Create
OneDrive
Apps

Work | Web

New chat

Copilot

Catch up on a meeting
Recap
SLG Weekly Solutions Blitz
MSIT

Prep for that meeting
Help me prepare for
Msft / TWC: AI Updates an...

Wrap up your week
Schedule a call with person
Friday at 3pm
MSIT

Retrieve buried info
What does file say about [deadlines] ?
MSIT

Stay informed
What's the latest from person , organized by emails, chats, and files?

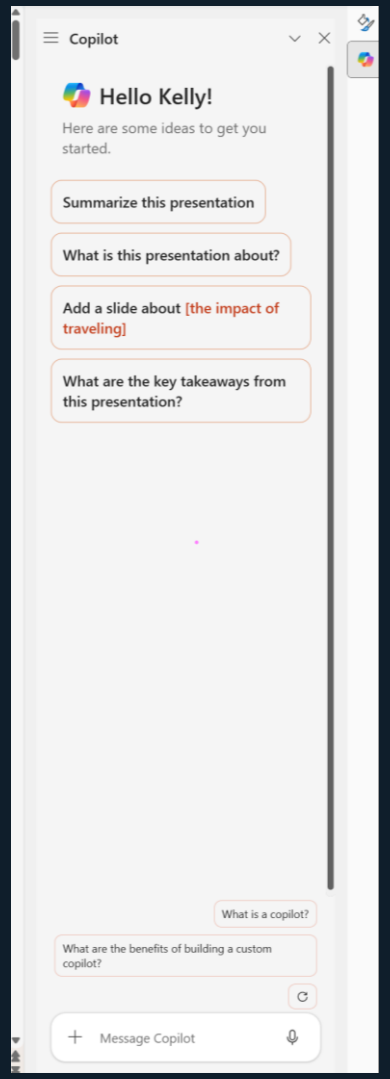
Understand the main points
List key points from file

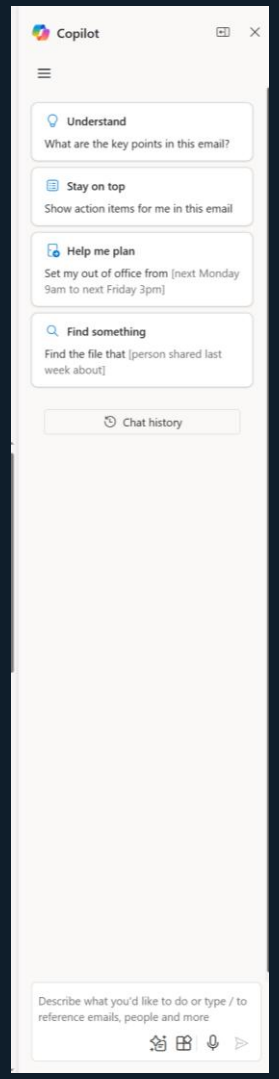
View prompts

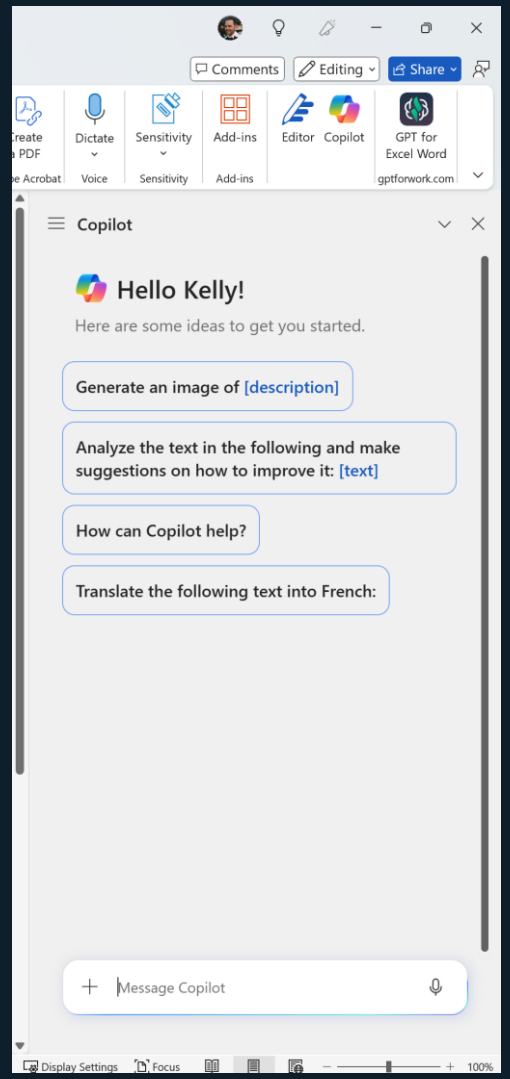
Message Copilot

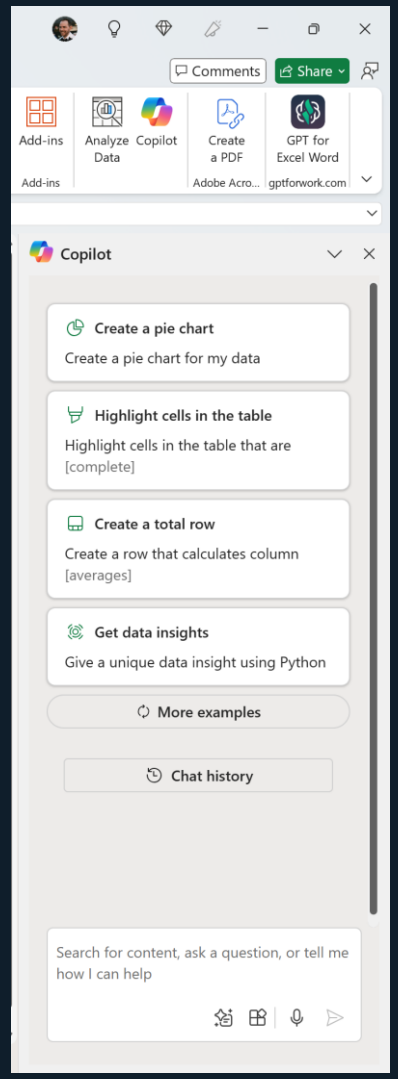
Add content

KC


Copilot
Hello Kelly!
Here are some ideas to get you started.
Summarize this presentation
What is this presentation about?
Add a slide about [the impact of traveling]
What are the key takeaways from this presentation?
What is a copilot?
What are the benefits of building a custom copilot?
Message Copilot


Copilot
Understand
What are the key points in this email?
Stay on top
Show action items for me in this email
Help me plan
Set my out of office from [next Monday 9am to next Friday 3pm]
Find something
Find the file that [person shared last week about]
Chat history
Describe what you'd like to do or type / to reference emails, people and more


Comments
Editing
Share
Dictate
Voice
Sensitivity
Add-ins
Editor
Copilot
GPT for Excel Word
gptforwork.com
Copilot
Hello Kelly!
Here are some ideas to get you started.
Generate an image of [description]
Analyze the text in the following and make suggestions on how to improve it: [text]
How can Copilot help?
Translate the following text into French:
Message Copilot
Display Settings
Focus
100%


Comments
Share
Add-ins
Analyze Data
Copilot
Create a PDF
GPT for Excel Word
Adobe Acro...
gptforwork.com
Copilot
Create a pie chart
Create a pie chart for my data
Highlight cells in the table
Highlight cells in the table that are [complete]
Create a total row
Create a row that calculates column [averages]
Get data insights
Give a unique data insight using Python
More examples
Chat history
Search for content, ask a question, or tell me how I can help

Copilot

Your everyday AI companion available on **web, mobile, and Windows**

M365 Copilot

Your Copilot for Personal Productivity (M365 apps like Teams, Outlook, Word, etc.)

Copilot Studio

Build your own Copilot or extend M365 Copilots

Microsoft Power Platform

A complete low-code digital transformation platform.
Innovation anywhere. Unlocks value everywhere.

Power Apps
Build Apps at Scale

Power Automate
Process automation

Power BI
Business analytics

Copilot Studio
DIY intelligent chatbots

Power Pages
External websites

Dataverse
Unlock the full value of the Platform

Management tools
Control access, security and governance.

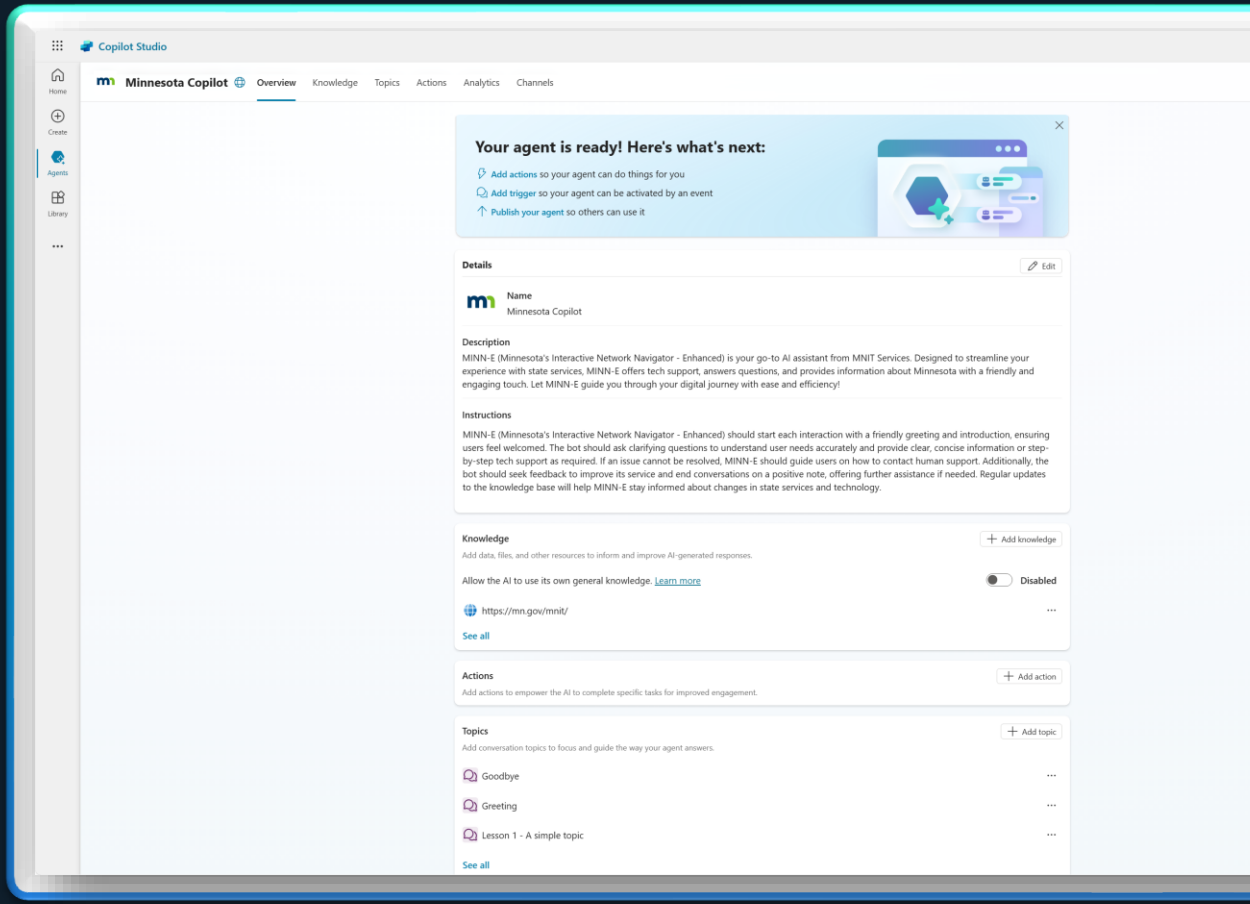
AI Builder
Democratize Artificial Intelligence

Data connectors

What is Copilot Studio?

With Microsoft Copilot Studio, you can build custom copilots, deploy to preferred channels, and engage with your users all with one end-to-end conversational AI platform:

- **Time to Value:** Rapid deployment of AI solutions for immediate benefits
- **User-Friendly:** Low-code tools enable easy development by non-technical staff
- **Better Engagement:** AI-driven chatbots enhance communication with constituents, employees, partners, an vendors
- **Informed Decisions:** Know what your constituents are looking for/asking about, better self-service
- **Secure and Compliant:** Meets government standards for data protection and regulation



Customize your agent

Easily tailor your agent's building blocks to meet your unique business needs in a comprehensive, end-to-end studio

Building blocks

Knowledge
Existing enterprise data in or outside of M365 that copilot can query

Actions
Tasks and processes your copilot can perform across LOB services/apps

Logic
Defined conversation paths for your copilot to follow when triggered

Channels
Where and how your end users engage with your copilot

Not just a "chatbot"

World Class UX	Declarative	Rich Response	Intuitive	Ease of use	**Natural language to build**
Logic + Automation	Low code logic	**Generative Answers + Actions**	Power Automate	Custom Azure Skills	
Next-Gen AI	Prebuilt LLM	**Generative AI**	Proactive suggestions	Bring your own Model (BYOM)*	
Connected experience	**Microsoft Copilot**	Power Platform	**1000+ Connectors**	Azure AI Studio	
Copilot Lifecycle	Test Pane	Collaboration	Solution Management	ALM Automation	
Security + Governance	Trusted identity	Full visibility	Advanced RBAC	Granular DLP control	

Microsoft's end-to-end copilot building platform

To make an LLM-based Chatbot, You Will Need...

Copilot Studio

An Interface

- A fully accessible, WCAG-conformant chatbot interface, hosted for you
- Deployable to 20+ channels
- Conversational Topic Authoring Interface

System Integration

- Natively plugs into the Microsoft stack
- Connect to any system through Power Platform Connectors
- Function Calling against external systems

AI Safety

- Authentication System (Azure Entra ID, OAuth, etc.)
- Adjustable Content Moderation Strictness
- Defense against Prompt Injection Attacks

Bot Skills

- AI-based Conversation Orchestration
- Entity (Value) Parsing
- Extend with Azure Bot Framework Skills

Peripheral Support

- Transcript Retention Infrastructure
- Managed Application Lifecycle Management Solution
- Conversational Analytics and Insights

A Very Good Large Language Model as the Foundation
Defined Data Sources

Employee Leave Request

Copilot Studio

Environment
Kelly C - Dynamics

Home
Create
Agents
Library
...

Describe your agent to create it

Helpdesk | Expense tracking | HR and benefits

Use everyday words to describe what your agent should do

This AI-powered feature above is currently in preview. See terms and supplemental terms

Recent

See more

Name	Type	Last modified	Last published	Owner	Engaged sessions
K-GOV	Agent	Kelly Cason 14 minutes ago	15 days ago	Kelly Cason	0
Adaptive Card Gallery	Agent	# Microsoft Copilot Studio 27 d...	Never	Kelly Cason	--
IL-Comptroller Copilot	Agent	# Microsoft Copilot Studio 1 mo...	1 month ago	Kelly Cason	0
WEC Copilot	Agent	# Microsoft Copilot Studio 1 mo...	1 month ago	Kelly Cason	0
HHS Copilot	Agent	# Microsoft Copilot Studio 4 mo...	4 months ago	Kelly Cason	0

Learning resources

Quick start: Create and deploy an agent | Documentation | Security and Governance | Responsible AI FAQs

Copilot Studio

Environment
Kelly C - Dynamics

Home
Create
Agents
Library

K-GOV

Overview | Knowledge | Topics | Actions | Analytics | Channels

Published 2/25/2025 | Publish | Settings | Test

+ Add knowledge

Search knowledge

All | Public website | SharePoint

Last refreshed now

Name	Type	Last modified	Status
https://mn.gov/mnit/	Public website	Kelly Cason 22 days ago	Ready
StateGovSite	SharePoint	Kelly Cason 15 days ago	Ready

Test your agent

Hi there, I'm K-GOV, Kelly's Government Operations Virtual agent. I'm here to help you find information about state government policies, programs, and services.

How can I assist you today?

**Please note that I may use AI to generate some of my responses to provide you with the most accurate and up-to-date information*

6 minutes ago

Ask a question or describe what you need

0/2000

Make sure AI-generated content is accurate and appropriate before using. See terms

SG State Gov Site

Private group Following 1 member

Home
Conversations
Documents
Shared with us
Notebook
Pages
Site contents
Invoice Signature Requests
Signed Invoices
Employees
Recycle bin
Edit

Return to classic SharePoint

+ New Upload Edit in grid view Sync Add shortcut to OneDrive Pin to Quick access Export to Excel ... All Documents

Documents

Name	Modified	Modified By	+ Add column
K-GOV_Vacation_Policy.docx	February 25	Kelly Cason	

K-GOV Vacation Policy

At K-GOV, we believe in providing our employees with ample time to rest, recharge, and take care of personal matters. Our vacation policy is designed to offer flexibility and support to our team members. Below are the details of our vacation policy.

Holidays

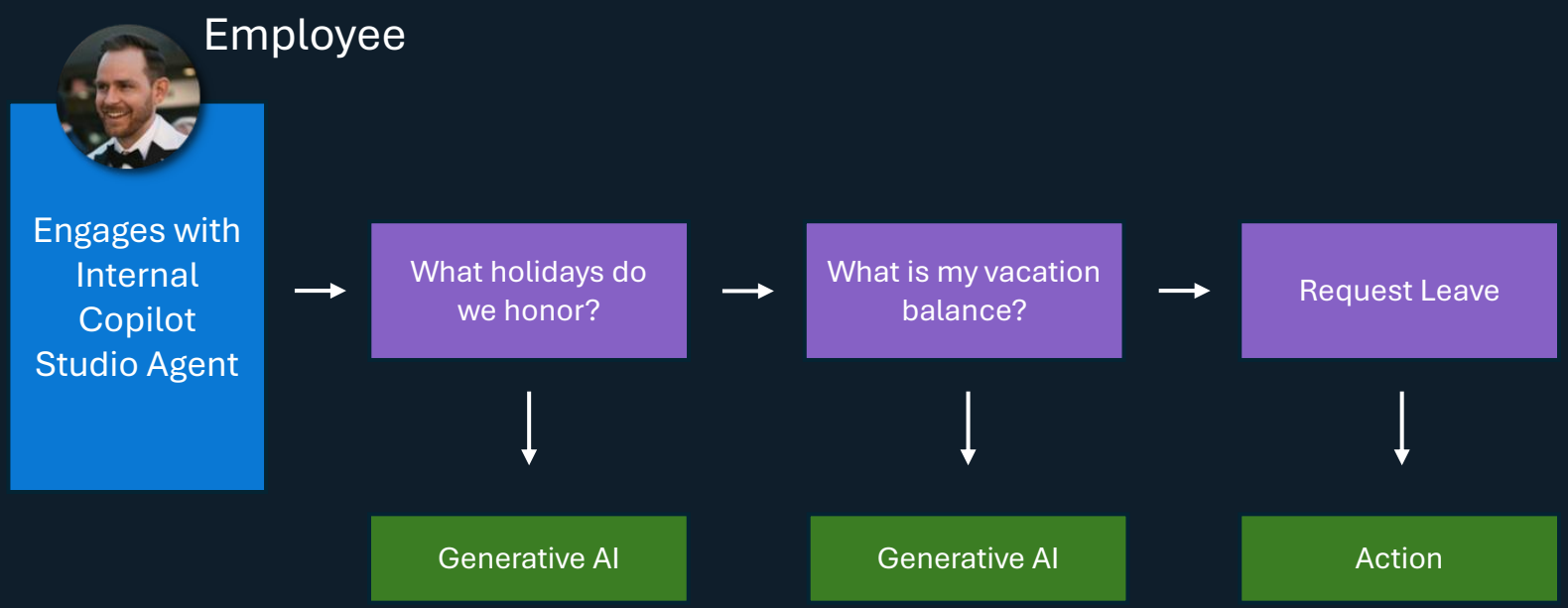
K-GOV honors the following holidays:
- New Year's Day
- Martin Luther King Jr. Day
- Presidents' Day
- Memorial Day
- Independence Day
- Labor Day
- Veterans Day
- Thanksgiving Day
- Christmas Day

Vacation Days

Individual Contributors:
- 15 vacation days per year

Managers:
- 20 vacation days per year

Employee Leave Request Story



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How can I assist you today?

**Please note that I may use AI to generate some of my responses to provide you with the most accurate and up-to-date information*

10 minutes ago

Ask a question or describe what you need

0/2000

Make sure AI-generated content is accurate and appropriate before using. See terms

Copilot Studio

Environment
Kelly C - Dynamics

Home
Create
Agents
Library

K-GOV

Overview | Knowledge | Topics | Actions | Analytics | Channels

Published 2/25/2025 | Publish | Settings | Test

Activity map

Variables | Track between topics

Session started

Knowledge sources

Vacation Balance
Topic

Session complete

Test your agent

Fantastic! When is the final date of your leave?

4 minutes ago

5/28/2025

4 minutes ago

Lastly, what type of leave would you like to request?

4 minutes ago

Vacation

4 minutes ago

One moment while I create that request for you...

Congrats! Your vacation request has been created and is now pending approval from your manager.

If approved, your remaining vacation balance will be 10 days.

4 minutes ago

Ask a question or describe what you need

0/2000

Make sure AI-generated content is accurate and appropriate before using. See terms

Citizen Service (Chat)

Copilot Studio

Environment
Kelly C - Dynamics

Home
Create
Agents
Library

K-GOV

Overview | Knowledge | Topics | Actions | Analytics | Channels

Published 2/25/2025 | Publish | Settings | Test

+ Add knowledge

Search knowledge

All | Public website | SharePoint

Last refreshed now

Name	Type	Last modified	Status
https://www.dot.state.mn.us/	Public website	Kelly Cason 9 seconds ago	Ready
StateGovSite	SharePoint	Kelly Cason 15 days ago	Ready

Test your agent

Hi there, I'm K-GOV, Kelly's Government Operations Virtual agent. I'm here to help you find information about state government policies, programs, and services.

How can I assist you today?

**Please note that I may use AI to generate some of my responses to provide you with the most accurate and up-to-date information*

Just now

Ask a question or describe what you need

0/2000

Make sure AI-generated content is accurate and appropriate before using. See terms

Citizen Service Story

Citizen

Engages with Copilot Agent on Portal

→ What are the Office Hours? → Static Topic

→ Questions about DOT website → Generative AI

→ Newsletter Sign-Up → Form Submission

→ Escalation to Live Agent → Agent Handoff

K-GOV Portal

Our Permits | My Permits | Sign in

Let's chat
We're Online

Copilot Studio – A Look Inside

Demo

Copilot Studio Use Cases

External Use-Cases

- **Information Assistant** (FAQ's for your website)
- **311** (reporting potholes, trees down, traffic)
- **Customer/Citizen Service**
- **Appointment Scheduling** (DMV visits, healthcare appts.)
- **Application Processing** (forms, permits, licenses, benefits)
- **Information Dissemination** (public services, events)

Internal Use-Cases

- **HR Assistant** (benefits info, assign devices, leave requests)
- **IT Support** (password reset, system access, device repair)
- **Onboarding** (training, policies, processes)
- **Legislation Summarization** (summarize legislation, documents)

Resources

- Copilot Studio – Complete Tutorial
- Mastering Generative Answers in Copilot Studio
- Full How-To Series – Dewain Robinson (Microsoft Product Group)
- How to Create Autonomous Agents in Copilot Studio
- Copilot Studio with Dynamics 365 Data
- Connect Copilot Studio to Dynamics 365 for Live Chat

Any questions?

Autonomous Agents

What are agents?

Agents are AI assistants that can help optimize business processes and enhance productivity

Agents vary in level of complexity and capabilities depending on your need

Simple — Advanced

Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions

Generally available

Task

Take actions when asked, automate workflows, and replace repetitive tasks for users

Generally available

Autonomous

Operate independently, dynamically plan, orchestrate other agents, learn and escalate

Preview

Engagement management agent

Processes inbound requests for a project

HOW IT WORKS

1 - Trigger → 2 - Instructions → 3 - Plan → 4 - Outcome

Agent automatically reacts to triggers

When a new email arrives
Office 365 Outlook

Agent follows your instructions

- You are an agent that helps to evaluate and staff incoming engagement requests from clients.
- First, analyze the incoming email to extract key client details. Verify the engagement information and confirm the industry sector. Assess historical data and identify the required expertise. Assign a suitable partner and notify them. Log the engagement details and inform the engagement director.

Agent completes the ask using your data and knowledge

- Engagement staffing logic
- Submit engagement
- Send an email
- Retrieve partner
- Message in Copilot

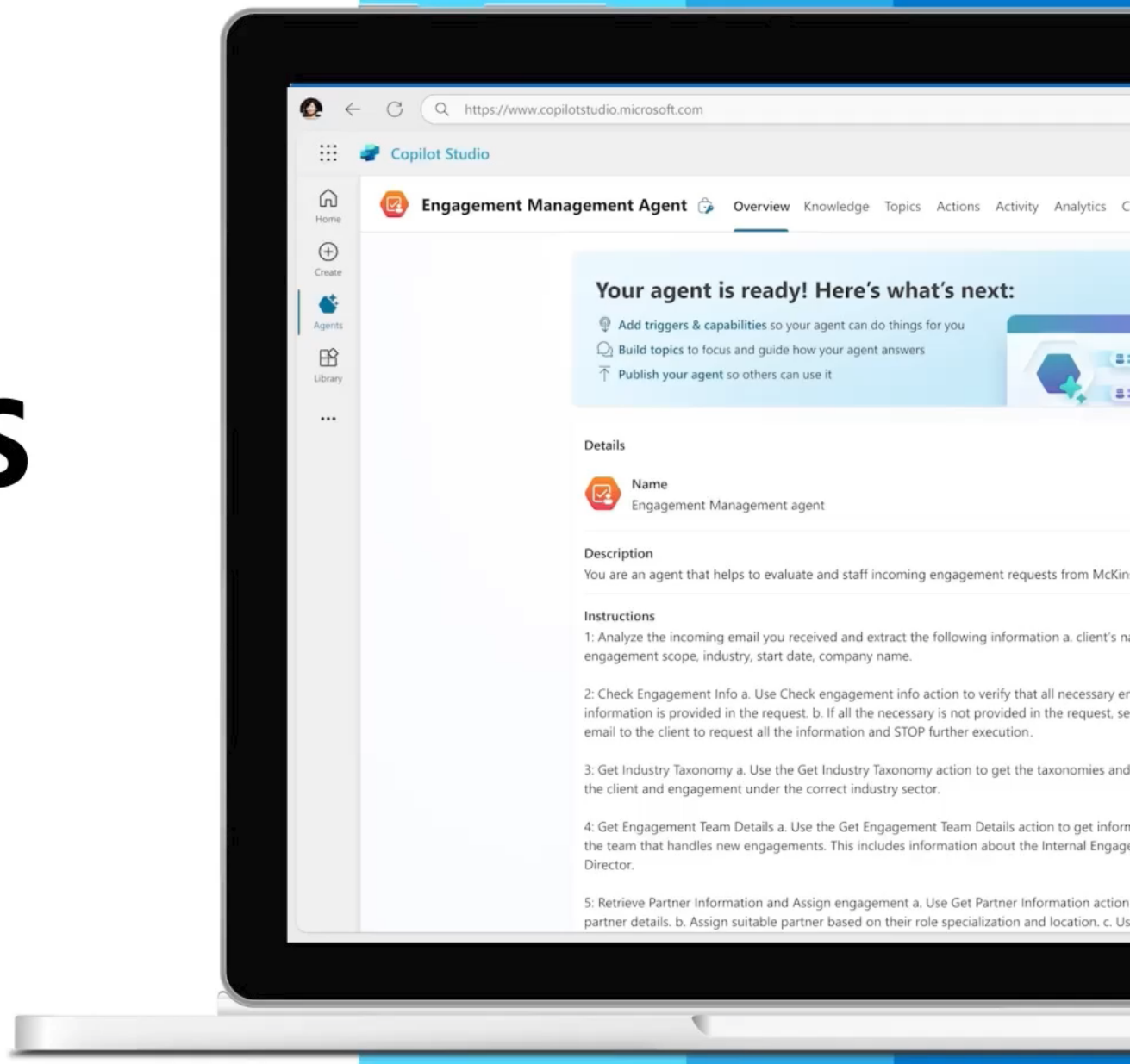
Agent generates a response

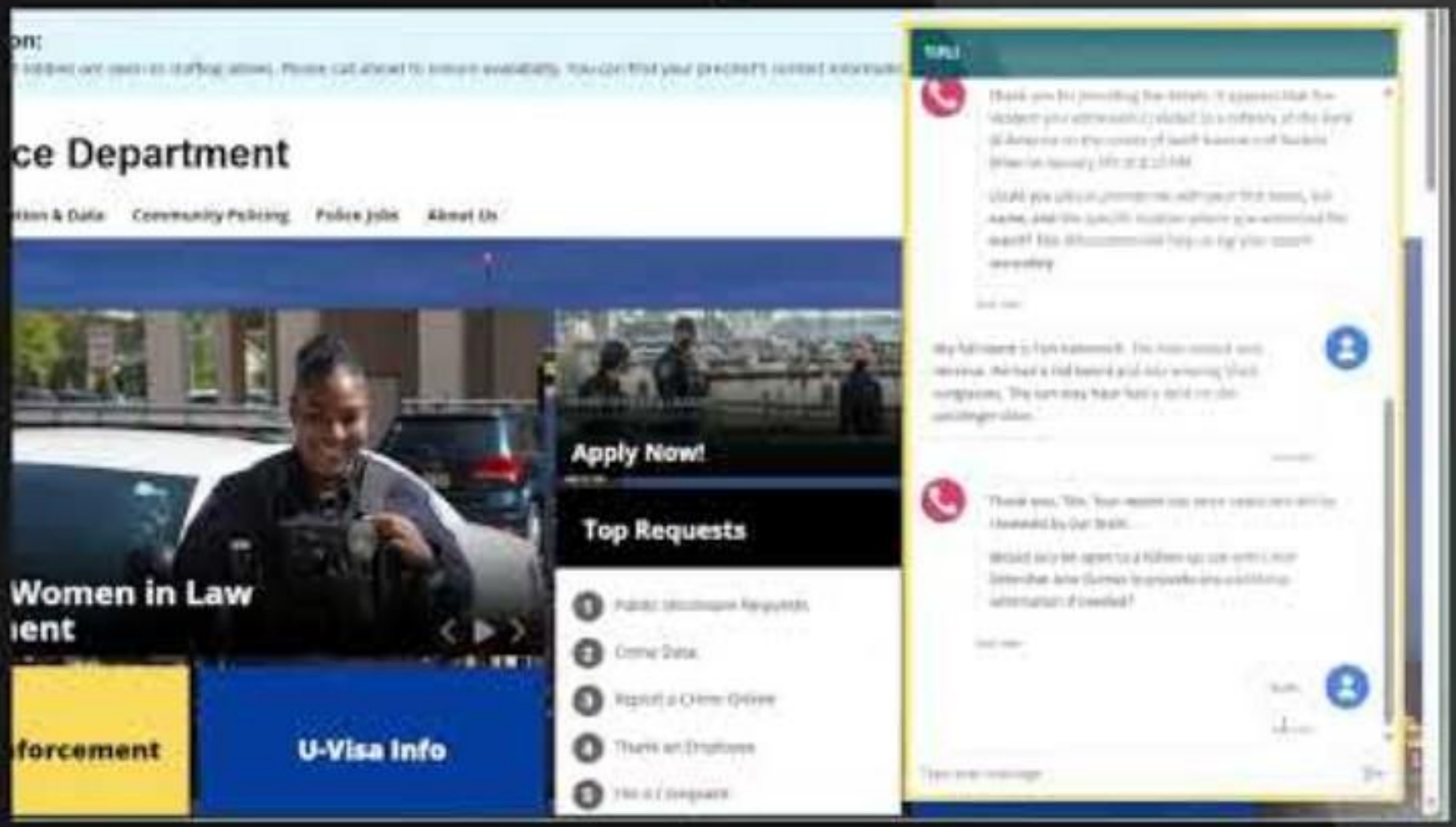
Agent

You have been assigned to a new engagement requiring your expertise in Technology Solutions.

Copilot Studio

Autonomous Agent




ce Department
Community Policing
Police Jobs
About Us
Women in Law
ient
Apply Now!
Top Requests
forcement
U-Visa Info

Feedback

Please take a moment and let us know how we did today ☺

Copilot Studio: Front Door to AI

THANK YOU!

Joe Alexander
joealexander@microsoft.com

Copilot Studio is a consumptive service that enables use of agents

Copilot Studio usage burns “messages"

Full feature parity across message pack and metered offering

Burn rate parity across message pack and metered offering

Leverage your existing Azure commitments (MACC) with the Pay-as-you go meter **(Not in GCC yet)**

Coming to GCC

Message packs

- Tenant-wide message packs
- 25,000 messages/month
- $200 per pack/month

Pay-as-you-go

- New PAYG meter
- $0.01/message
- Can decrement MACC

Utilization rates depend on type of agent and prompt

	Orchestration Mode	M365 Copilot Users	Copilot Chat Users	Use of Other Agents Built w/ Copilot Studio
Web-grounded answers Dynamically-generated responses based on the web as a knowledge source.	Classic & Generative	0	0	2 messages
Classic answers Predefined responses manually authored by agent makers through topics (includes messages, connectors, flows etc.) that are static unless manually updated in Classic Orchestration mode. Used when a precise or controlled response is desired output. Each action (not each topic) counts as an answer. Not available in agent builder.	Classic only	-	-	1 message
Generative answers Dynamically-generated responses based on knowledge sources and context that provide flexible and natural interactions.	Classic & Generative	0	2 messages	2 messages
Tenant graph grounding for messages Grounding to enhance AI agents with up-to-date, context-aware knowledge from Microsoft 365 and external data, offering built-in security and inheriting data access governance policies	Classic & Generative	0	30 messages	30 messages
Autonomous actions AI-led orchestration for triggers, topics, Power Platform premium and custom connectors, cloud flows and GPT 4o prompts to automate complex business processes. Not available in agent builder.	Generative only	25 messages	25 messages	25 messages

Notes

1. Each interaction with an agent could utilize multiple utilization rates simultaneously i.e., an agent grounded in Tenant graph could use 32 messages (30 for the graph grounding and 2 for Generative Answer) to respond to a single complex prompt from the user. Most agents built natively in SharePoint or Copilot Chat will have Tenant graph Grounding enabled by default.
2. Generative answers, tenant graph grounding for messages, web-grounded answers and autonomous actions apply to both declarative agents and custom engine agents.

Agent rights map

Tenant	Copilot Studio (meter/pack) subscribed			Not subscribed to Copilot Studio (meter/pack)		
User license	**M365 Copilot only**	**Copilot Studio maker license ($0) only**	**Neither M365 Copilot nor MCS maker license**	**M365 Copilot only**	**Copilot Studio ($0) maker license only**	**Neither M365 Copilot nor MCS maker license**
Create agents in agent builder	Yes, included	Yes, via Copilot Chat with PayGo enabled	Yes, via Copilot Chat with PayGo enabled	Yes, included	No	No
Create agents in Copilot Studio	Yes, included	Yes, included	Only for PPAC maker roles	Yes	No	No
Use of agents grounded on web only	Yes, included	Yes, via Copilot Chat	Yes, via Copilot Chat	Yes, via Copilot Chat	Yes, via Copilot Chat	Yes, via Copilot Chat
Use "Generative Answers" and "Tenant graph Grounding" in M365 surfaces	Yes, included	Yes, consumption	Yes, consumption	Yes, included	No	No
Use "Generative Answers" and "Tenant graph Grounding" everywhere	Yes, consumption	Yes, consumption	Yes, consumption	No	No	No
Use autonomous actions in agents	Yes, consumption	Yes, consumption	Yes, consumption	No	No	No

Citizen Service (IVR)

Demo

Copilot Studio Interactive Voice Response Capabilities

- Open ended question to resident
- Conversational Response with unaligned intent
- AI generated answers using backend source of truth
- Intent switch to self service drivers license renewal
- Drivers License Renewal Opener
- Multiple questions and answers
- Alphanumeric data collection
- Missing attribute identification
- One step entity correction
- Dynamic back-end data dip to authenticate caller
- Secure payment processing support
- Escalate to live voice agent