

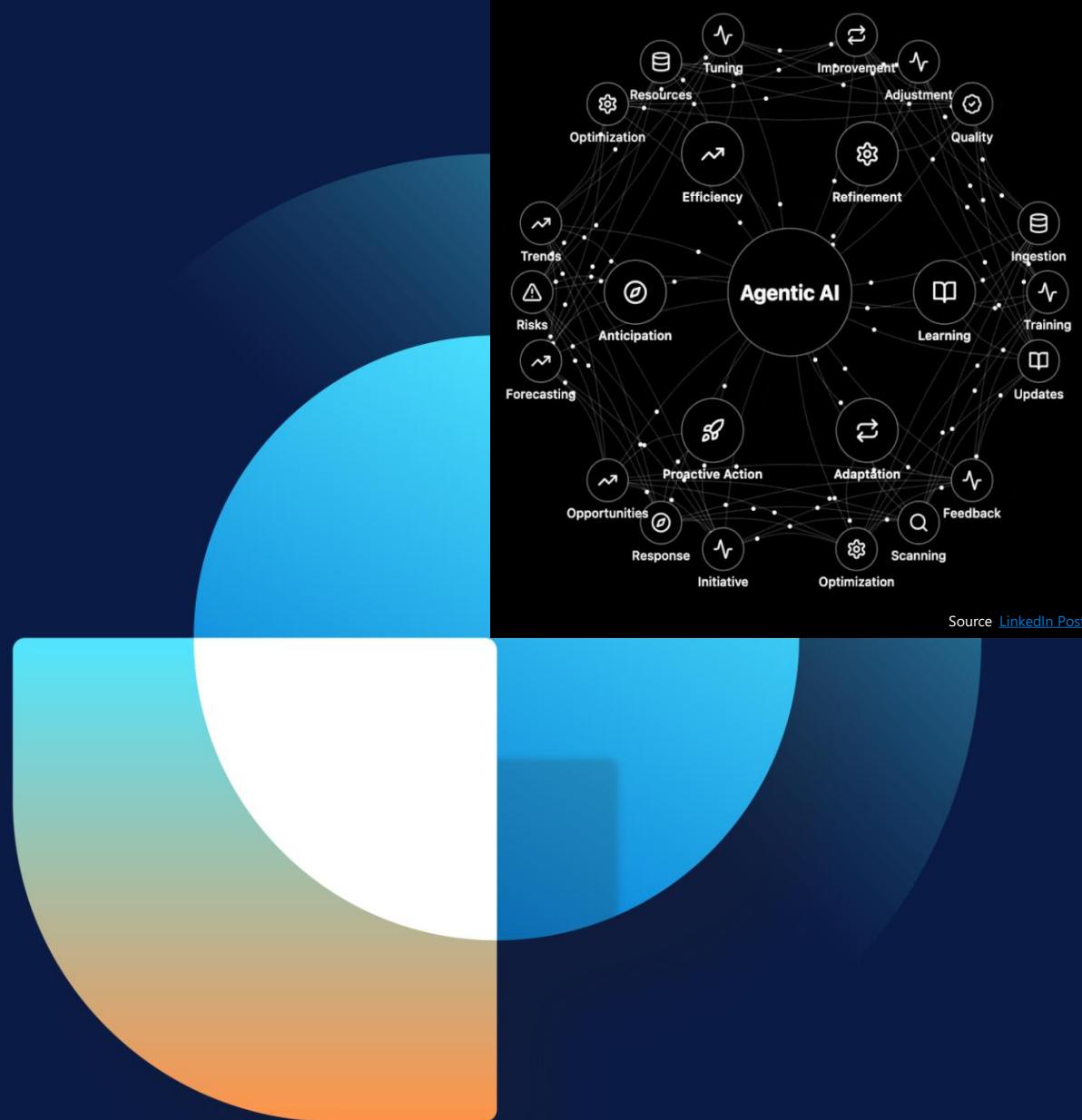


# Microsoft AI Agents Roadshow

Exploring Microsoft Platform for the Agentic AI Era

- XXXXXX** – Modern Work PSA
- YYYYYY** – Data & AI PSA
- ZZZZZZ** – Biz Apps PSA

Microsoft Americas  
Global Partner Solutions (GPS) - Technical Team  
Partner Solution Architects (PSA)





Our Partners' Agentic AI Opportunity:  
**“Mastering Today’s AI Tech  
Paves the Way  
for  
Future Success.”**

# Event Overview

2 Day immersive workshop with Hands-on labs and a Mini Hack challenge

## **Day 1:**

- Vision
- Copilot Chat and Copilot for M365 Overview
- Copilot Studio Overview
- Hands-on exercises – Building an agent with Copilot Studio
- Azure AI – Overview

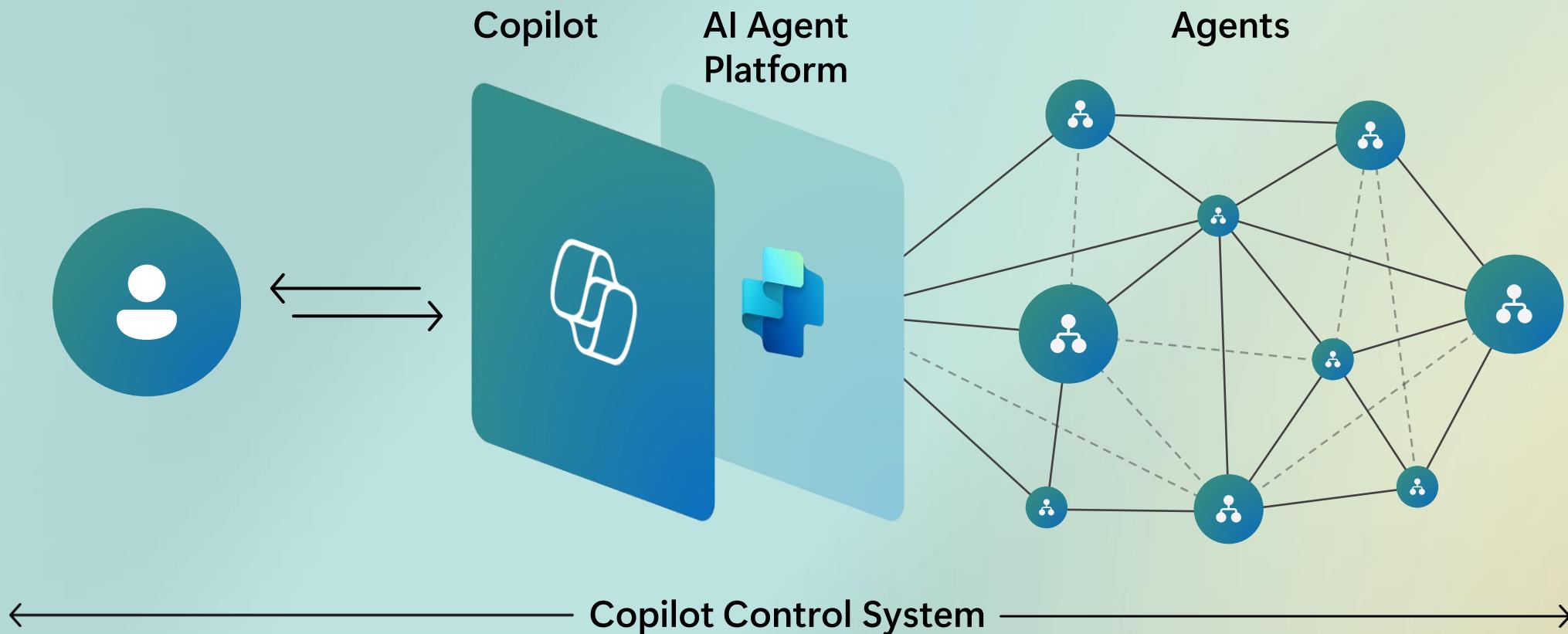
## **Day 2:**

- Hands-on exercises – Extending Copilot Studio agent with Azure AI services
- Hands-on exercise – Create an Agent with Azure AI Foundry
- Mini Hack challenge

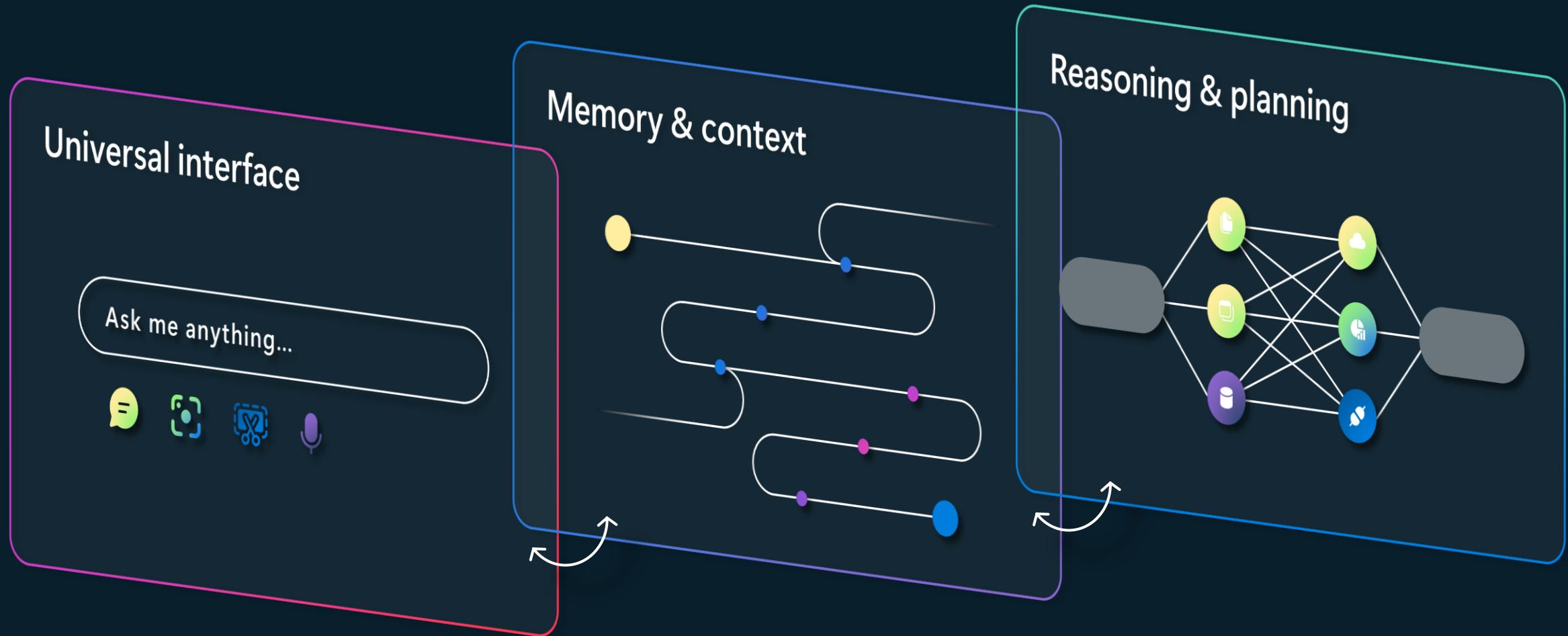
# Microsoft's Vision for Agentic AI



# Copilot is the UI for AI



# We are in a technology shift



# Building an agentic world



Personal  
agents



Organizational  
agents



Business process  
agents



Cross-org  
agents



## Copilot

**Every employee will have a Copilot**

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Works as your personal assistant

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Grounded in work content like email, meetings and documents

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The UI for AI



## Agents

**Every business process will have one or more agents**

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AI-powered system with actions, triggers and knowledge

---

Works on behalf of employees, teams and functions

---

Connected to Copilot or autonomous



## Agents

**Every business process will have one or more agents**

AI-powered system with actions, triggers and knowledge

Works on behalf of employees, teams and functions

Connected to Copilot or autonomous

### Agents You Build

Tailored to your unique business processes.

### Agents Built by Microsoft

Employee Self-Serve, SharePoint Agents, Dynamics 365 agents +

### Agents Built by 3rd Party ISVs

Adobe, ServiceNow, SAP, and many more.

# Agents in Microsoft 365



Facilitator  
agent



Project Manager  
agent



Employee  
Self-Service agent



SharePoint  
agents



Interpreter  
agent



Adobe



cohere

LinkedIn



SAP

servicenow.



workday

[aka.ms/AgentsinM365](http://aka.ms/AgentsinM365)

[aka.ms/ThirdPartyAgents](http://aka.ms/ThirdPartyAgents)



## Copilot Studio Autonomous agents



Sales  
Qualification



Supplier  
Communications



Account  
Reconciliation



Time and  
Expense



Customer Intent



Sales Order



Financial  
Reconciliation



Scheduling  
Operations



Customer  
Knowledge  
Management



Case Management



Sales  
Qualification



Case  
Management



Account  
Reconciliation



Time and  
Expense



Supplier  
Communications



Financial  
Reconciliation



Customer  
Intent



Knowledge  
Management



Sales  
Order



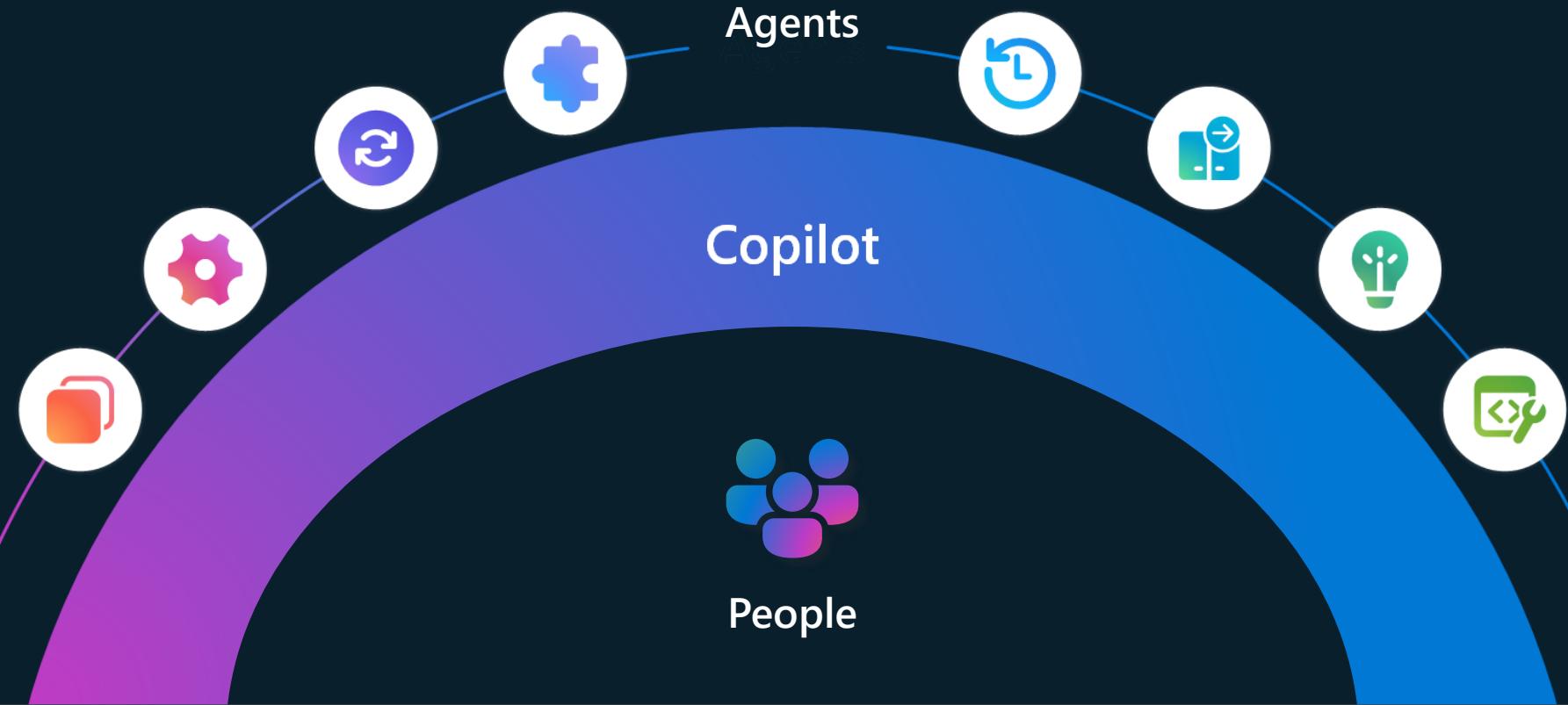
Scheduling  
Operations



Financial  
Reconciliation

## Dynamics 365 Agents

# Transform the way you work with Copilot + Agents



Copilot makes agents more personal to you

Agents make Copilot more capable

Together, they benefit from consistent security, governance & management

# Microsoft's AI Ecosystem

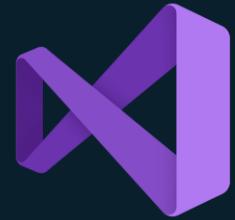
The image displays a collection of Microsoft AI ecosystem logos and icons, organized into three main sections:

- Top Section:** A grid of Microsoft 365 and productivity icons, including GitHub, Azure, Sales, Marketing, Customer Service, Finance, Supply Chain Management, Security, Bing, Word, Excel, PowerPoint, Outlook, Teams, Loop, Viva, Planner, OneNote, Forms, and Whiteboard. A Copilot icon is also present.
- Middle Section:** A grid of AI model families and related services. It includes the OpenAI Model Family (available day 1), Phi SLM Model Family, Mistral AI Model Family, Meta Llama 2 Model Family, Jais G42 Model Family, Cohere Model Family, Databricks Model Family, and Hugging Face Model Family. Below these are various AI service icons: Search AI, Text AI, Document AI, Vision AI, Language AI, Speech AI, Video AI, Prompt Shields, Protected Material, Groundness Detection, Content Safety, and Prompt Flow.
- Bottom Section:** A grid of Machine Learning Studio tools, including Data Preparation, Data Labeling, Model Catalog (+1600 Models), AutoML, Experiments, Model Training, and Model Registry.

# Microsoft offers multiple ways to build agents



Copilot Studio



Visual Studio



GitHub

# Microsoft AI Technologies and Platforms: Agent tooling

No code



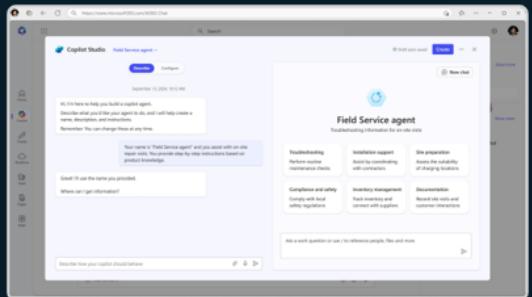
Natural language



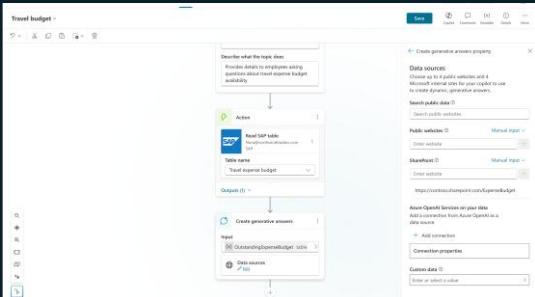
Pro code

Code-first

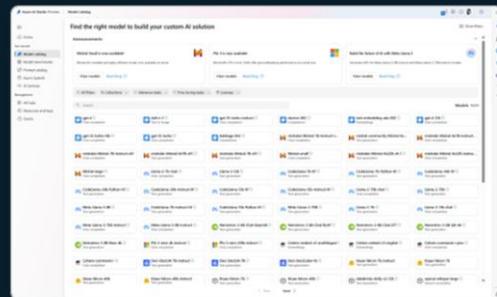
For End Users



For Makers



For Developers



Agent builder

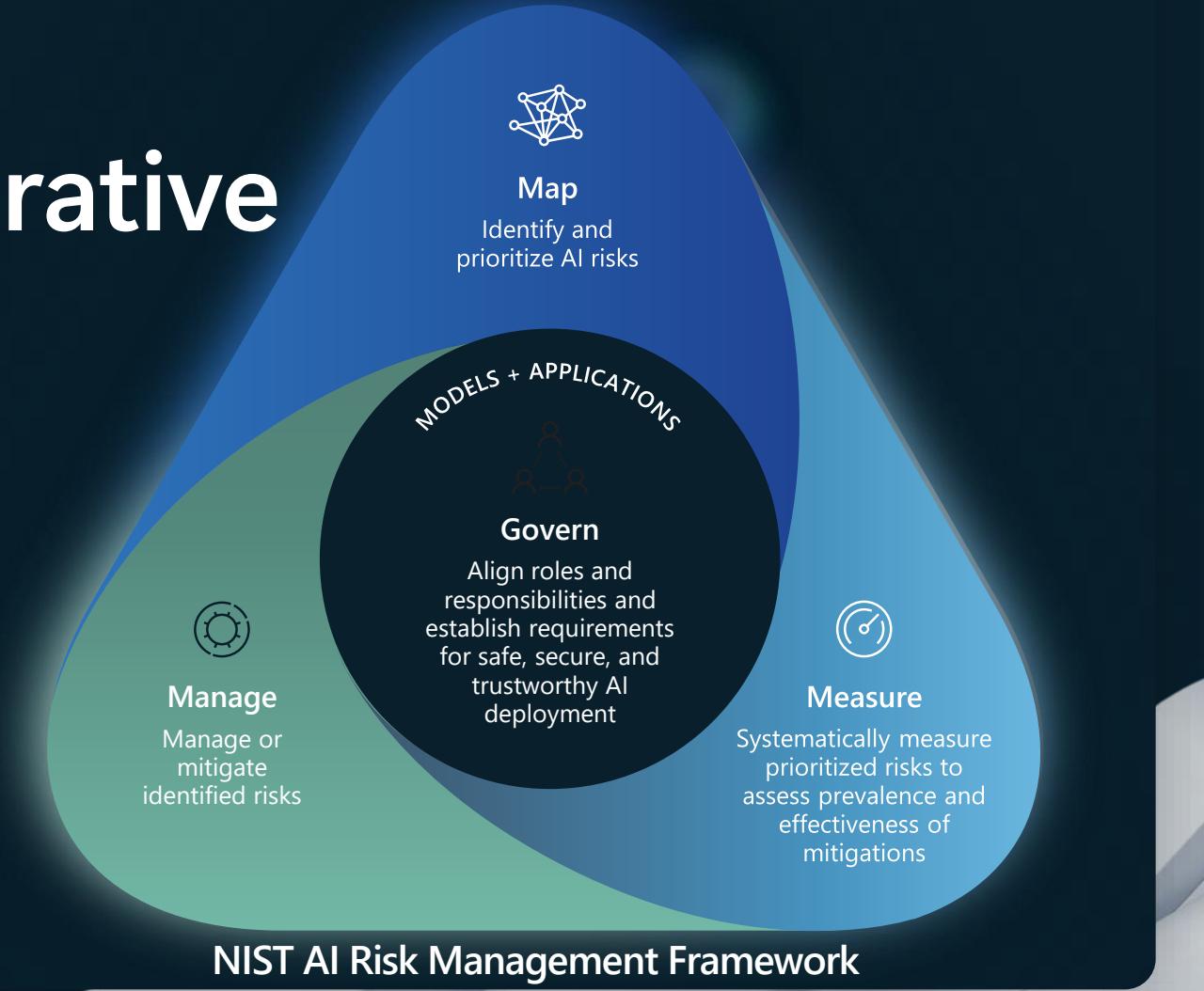
Copilot Studio

Copilot Studio +  
Azure AI Foundry

# Simple AI Decision Guide



# How we build generative AI systems responsibly



# Microsoft's AI Principles



Fairness



Reliability  
& Safety



Privacy &  
Security



Inclusiveness



Transparency



Accountability

# For Microsoft, security is job 1

“

*...prioritizing **security above all else** is critical to our company's future"*

Satya Nadella  
Chairman and CEO



A more resilient and transparent Microsoft

3

## 3 Principles of Microsoft's Secure Future Initiative

### Secure by Design

Security comes first when designing any product or service

### Secure by Default

Security protections are enabled and enforced by default, require no extra effort, and are not optional

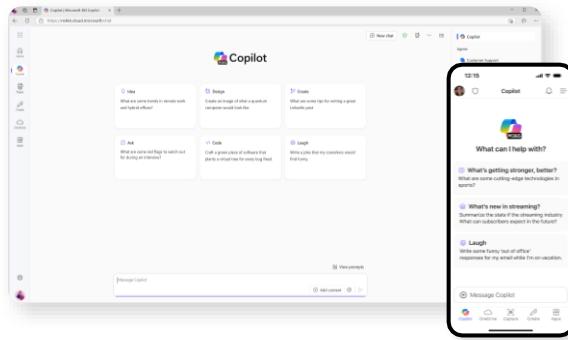
### Secure Operations

Security controls and monitoring will continuously be improved to meet current and future threats

# Agents in Microsoft 365



# Microsoft 365 Copilot Chat



## Chat

Free, secure AI chat –  
powered by GPT 4o and web grounded

+

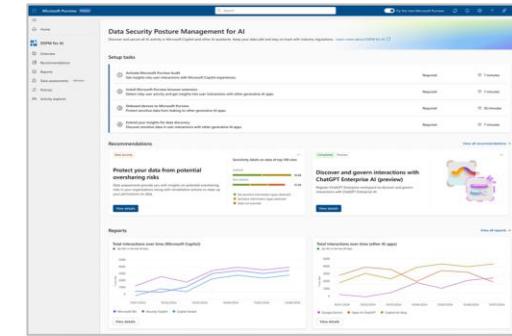
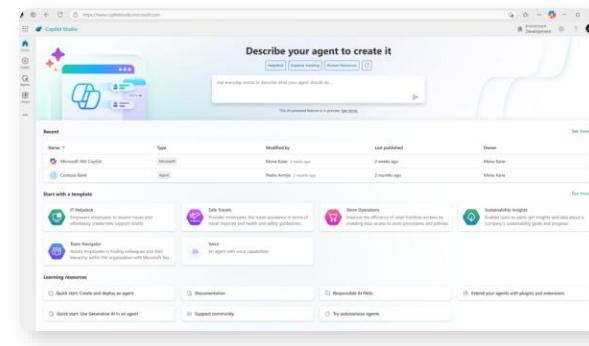
## Agents

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

+

## IT Controls

Enterprise Data Protection  
and agent management

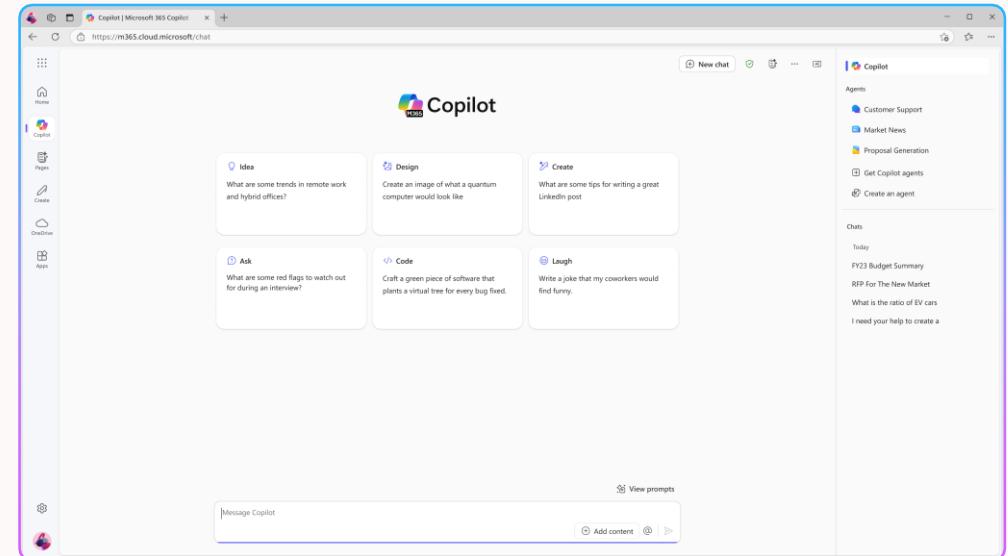


# Your company's approved AI chat tool

**Microsoft 365 Copilot Chat is an AI chat tool built specifically for work.** It uses the latest AI models and data from the web to answer your questions, generate content and ideas, and find information. It also protects your data so information from your chat conversation does not get exposed to the public.

In addition, with Copilot Chat you can:

- Upload files to get responses based on information from your work documents, presentations, etc<sup>1</sup>.
- Generate images<sup>1</sup> and data visualizations.
- Refine and collaborate on chat responses.
- Connect Copilot Chat to your organization data like team documents and internal SharePoint sites<sup>2</sup>.



Get started by going to [M365Copilot.com](https://M365Copilot.com)

<sup>1</sup>Image generation and file upload limits apply.

<sup>2</sup>Connecting Copilot Chat to your organization data is only available if your organization admin has enabled this capability.



# Microsoft 365 Copilot

Your AI assistant for work

\$30

## Copilot Chat

Free, secure AI chat



## Chat

Work-grounded

## Copilot in M365 apps

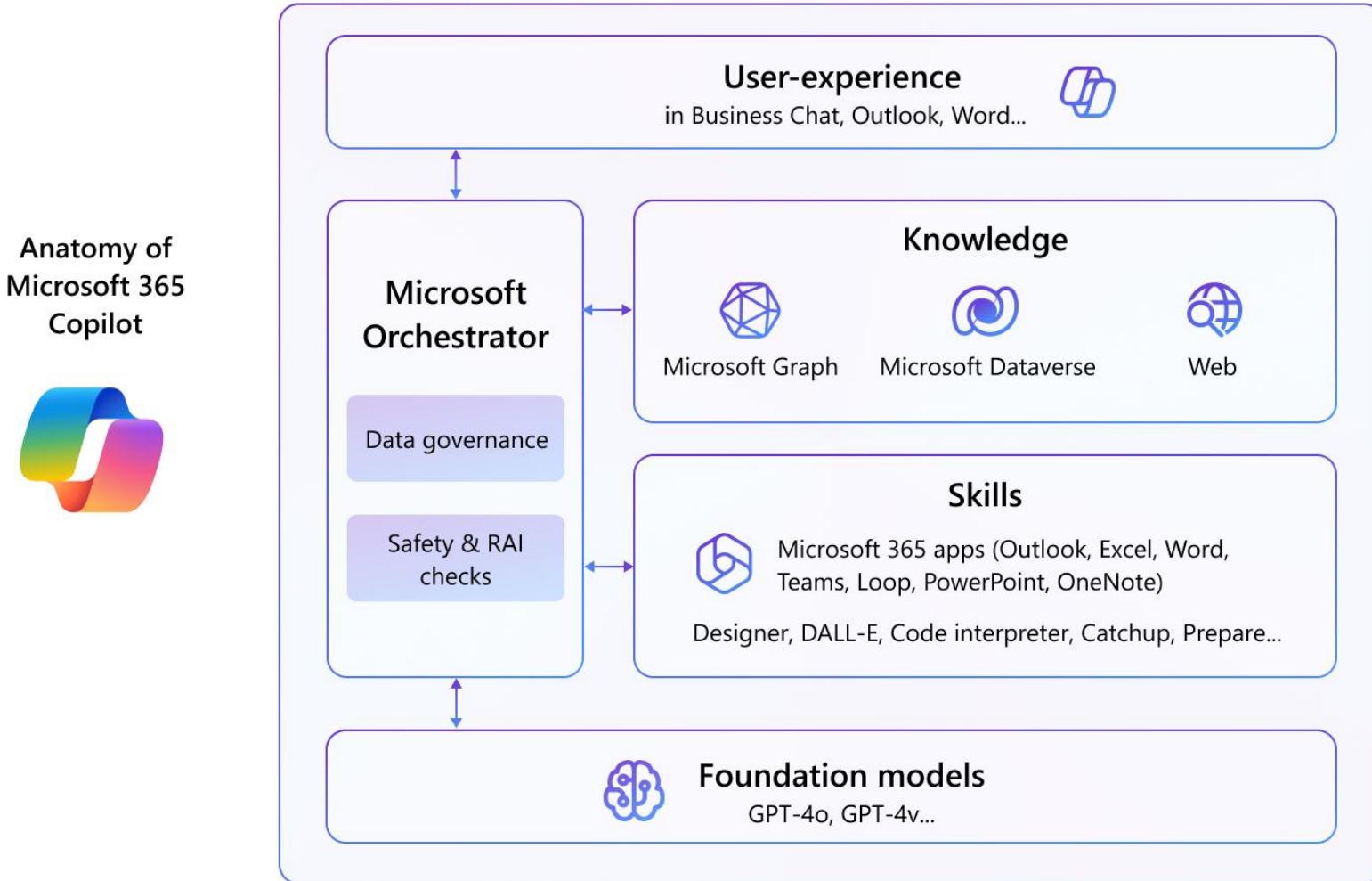
Teams, Outlook, Word, Excel, PowerPoint

## Agents

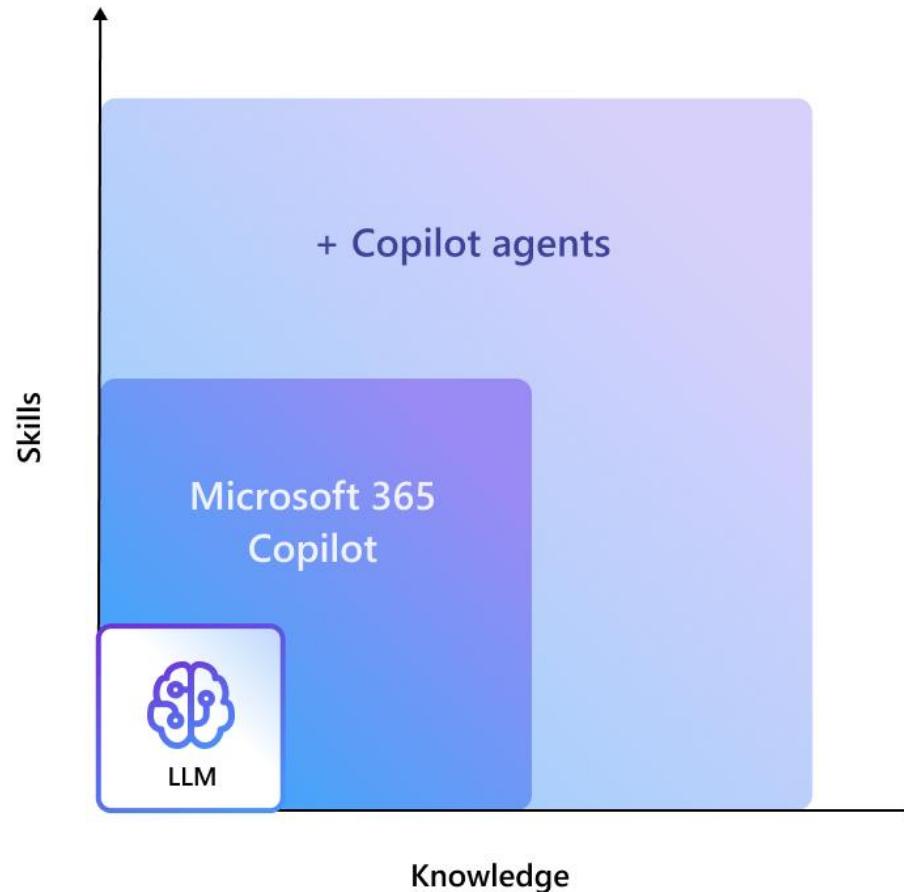
## Copilot Control System

## Copilot Analytics

# Extending Microsoft 365 Copilot

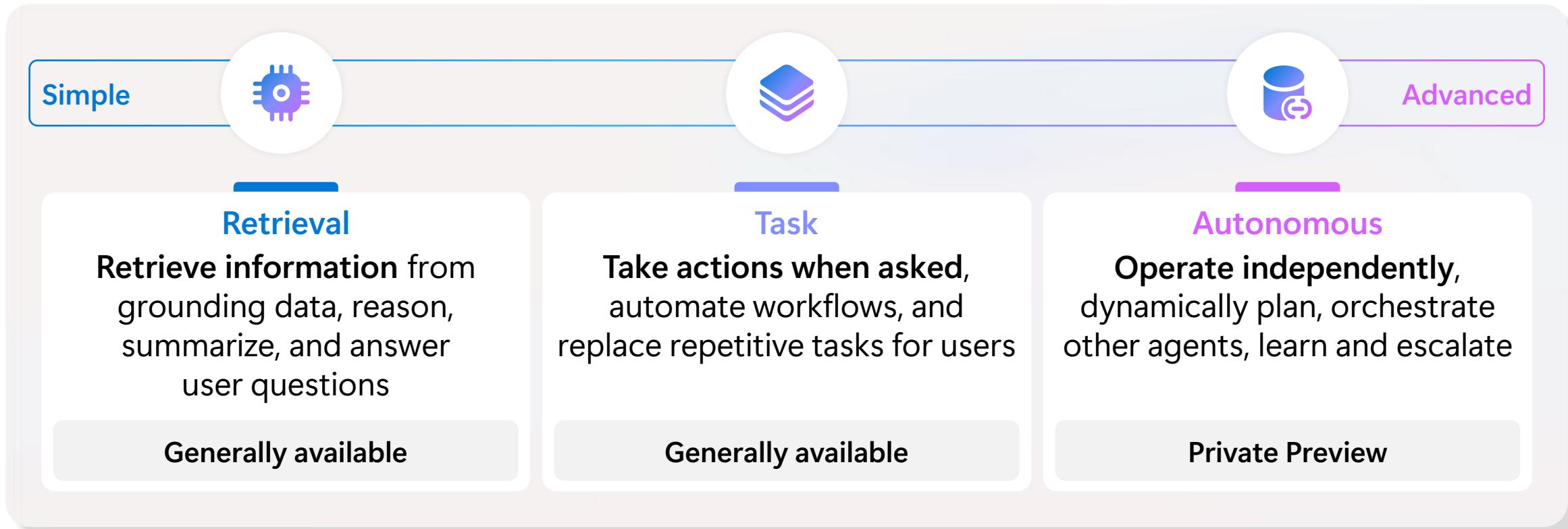


# Extending Microsoft 365 Copilot



# What are Copilot agents?

Agents expand Copilot's knowledge and skills or can operate autonomously to complete tasks or automate processes



Copilot agents vary in level of complexity and capabilities depending on your need

# Agents in the workplace

The screenshot shows the Microsoft Agents interface. At the top, there's a search bar with placeholder text "Describe your agent to create it" and three categories: "Helpdesk", "Expense tracking", and "HR and benefits". Below the search bar is a text input field with the placeholder "Use everyday words to describe what your agent should do". A note below the input says "This AI-powered feature above is currently in preview. See terms and supplemental terms". On the left, a sidebar has icons for Home, Create, Agents (selected), Library, and more. The main area is titled "Explore agents" and lists several templates: Safe Travels, Website Q&A, Team Navigator, IT Helpdesk, Store Operations, and Case Management. Each template has a small icon and a brief description. At the bottom, there's a section for "Learning resources" with links like "Quick start: Create and deploy an agent", "Documentation", "Security and Governance", "Responsible AI FAQs", "Quick start: Use Generative AI in an agent", "Support community", "Coming soon: See release plans", and "What's new: See release notes".

According to Gartner®, “by 2028, **33% of enterprise software applications will include agentic AI**, up from less than 1% in 2024.”

# Automate tasks and processes with agents

Agents use AI to make Copilot Chat even more personalized and intelligent for your daily work. Agents automate repetitive tasks and processes – think of them like apps for Copilot. Copilot Chat comes with a set of agent templates to get started with, or you can create custom agents for your own needs<sup>1</sup>.

**Get started with agent templates** by selecting “Get agents” in the right-side pane of Copilot Chat. Search for a specific template or browse the library.

Agents from Microsoft to try today:

## Prompt coach



Create effective Copilot prompts

## Idea coach



Get brainstorming assistance

## Writing coach



Refine your writing

## Career coach



Get personalized career advice and action plans

## Learning coach



Learn about topics and refine your skills

Besides the agents from Microsoft, your organization may have created agents for you to use as well. You can view these in the “Built for your org” section in the agent library.

<sup>1</sup>Agent creation is only available if your organization admin has enabled this capability.

# Automate tasks and processes with agents

Create a custom agent by selecting “Create an agent” in the right-side pane of Copilot Chat<sup>1</sup>. Describe what you’d like your agent to do or select “Configure” to further customize it. Creating an agent allows you to connect Copilot Chat to your organization’s shared data<sup>2</sup> to further unlock productivity – for example, you can connect the agent to a team SharePoint site and ask the agent questions about team documents.

Top ways to use custom agents:

## Automate contract reviews



Create an agent to identify key clauses, ensure compliance with legal standards, assess potential risk, explain clauses, and summarize lengthy contracts.

## Assist new hires with onboarding



Create an agent to greet new team members, assist them with technical issues, answer questions, and provide helpful resources.

## Review resumes



Create an agent to analyze resumes stored in a SharePoint library, compare them with job criteria, score candidates, and answer questions about candidates.

## Retrieve research materials



Create an agent that connects to a SharePoint link with research documents so you can quickly find relevant information.

## Get answers about company policies



Create an agent to get answers about company policies such as time off, remote work, benefits, workplace conduct, and health and safety.

<sup>1</sup>Agent creation is only available if your organization admin has enabled this capability.

<sup>2</sup>Shared data includes SharePoint files and data from your organization’s Microsoft Graph connectors. [Learn more about Microsoft Graph connectors](#).

# Agents in SharePoint



## Ready-made or make your own

Use the ready-made agent or create a custom agent with specific SharePoint content



## Easy to share

Just like other Microsoft 365 apps, share the link via email or Teams chat



## Increase collaboration

Add to a Microsoft Teams chat and @mention the agent for instant interaction



## Extensible

Launch Microsoft Copilot Studio directly from SharePoint for deeper customizations



## Secure

Defaults to your existing SharePoint permissions and sensitivity settings

The screenshot shows a SharePoint 'Product Maintenance' site. The left navigation bar has 'Documents' selected. The main content area displays a list of documents in grid view. At the top right of the list, there is a 'Create an agent' button, which is circled in blue. A large blue callout bubble at the bottom right points to this button with the text 'See agents in action!'. The page header includes the site name 'Boulder Innovations SharePoint', a search bar, and navigation links for Home, Documents, Pages, Site contents, and Edit. The footer contains a 'Confidential \ Internal only' note and a 'Not follow' link.

Name	Modified	Modified By
Current Deployments	Monday at 3:31 PM	Mona Kane
Parts & Inventory	Monday at 3:31 PM	Mona Kane
Product Failure Reports	Monday at 4:30 PM	Kat Larson
Service Manuals & Documentation	Wednesday at 8:30 PM	Kat Larson
City ordinances checklist.docx	July 27	Lee Gu
PSE regional cost analysis.xlsx	Yesterday at 1:40 PM	Adele Vance
RMC 21.40.030 - EV Charging Stations.pdf	August 20	Pradeep Gupta
Rollout announcements.docx	Yesterday at 2:10 PM	Lynne Robbins
Site deployment process.pptx	September 3	Megan Bowen



# Copilot Studio

## Build your own custom copilots & agents

Enhance customer experiences by adding a copilot to your external website or other channels

Build an internal copilot outside of Microsoft Copilot to help employees with specific functions

### Build with low code



with Copilot Studio  
(standalone)

## Customize Microsoft 365 Copilot

Use agents to customize Copilot to work with your unique business processes and data sources

Configure Copilot responses to specific questions

### Build an agent



with Copilot Studio  
(included in M365 Copilot)

# Examples of agent templates in Copilot Chat



The simplest way to get started with agents. Once enabled by an admin, users can @mention the agent in Copilot Chat or open it directly by selecting it from the right-side pane.

Agent Name	Description
 Writing Coach	Provides detailed feedback on writing. Helps change the tone of messages, translates text, and assists in writing tasks
 Idea Coach	Helps users brainstorm and organize ideas
 Prompt Coach	Assists users in creating effective well-structured prompts for Copilot
 Career Coach	Provides personalized career development suggestions including role understanding, skill gap analysis, learning opportunities, and career transition plans
 Learning Coach	Helps users understand complex topics by breaking them down into simple, intermediate, and advanced summaries. Provides guided practice and learning plans
 Visual Creator	Assists users with creating images and videos