



mibuso.com

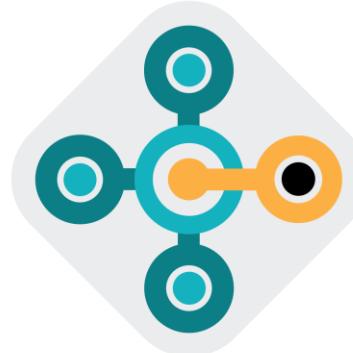


AJ Ansari

COO & Partner

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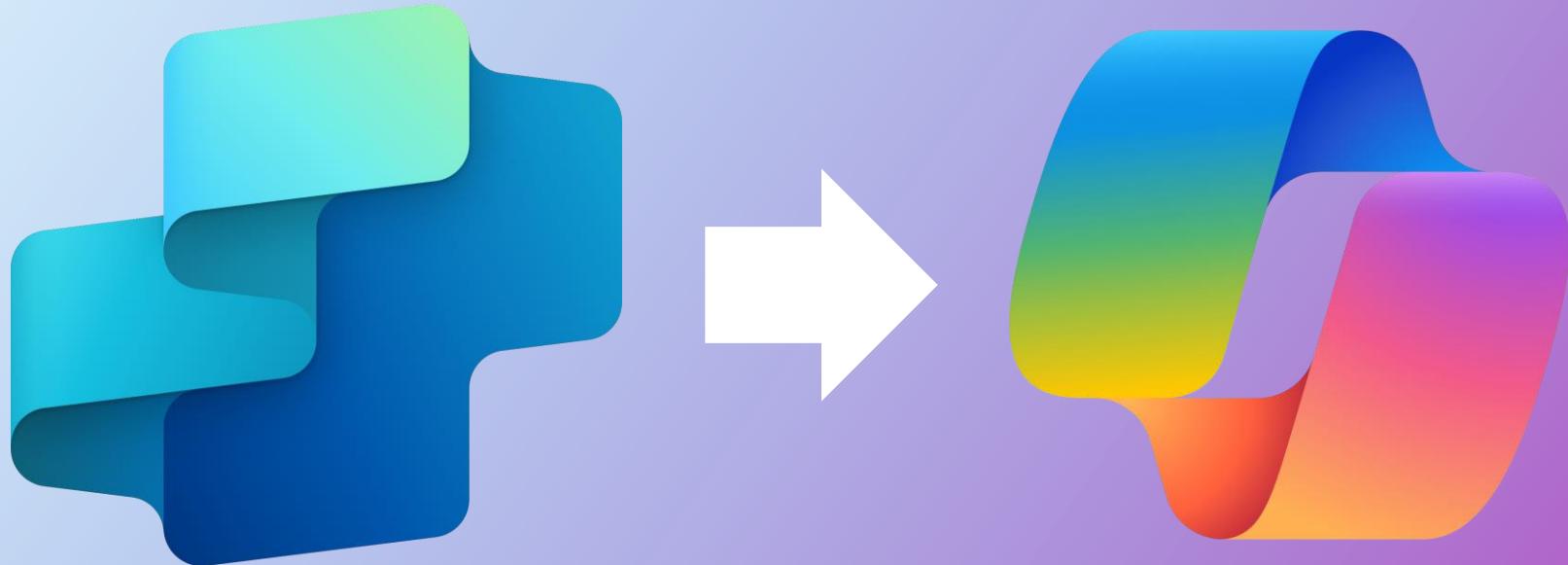


<<< BC Podcast
Coming
July!

Only BC Fans



F1
Formula 1



Microsoft Copilot Studio



Get started today



aka.ms/trycopilotstudio



Learn more

Copilot Studio website

aka.ms/copilotstudio

Blog

aka.ms/copilotstudиoblog

Demo

aka.ms/copilotstudиodemo

Sizzle video

aka.ms/copilotstudиostizzle

Product documentation

aka.ms/copilotstudиodocs

Ignite on-demand session

aka.ms/copilotstudиotignite

Community page

aka.ms/copilotstudиocommunity

Useful Resources



aka.ms/trycopilotstudio

- ➊ Sign up for Developer Environment (free w/ M365 Work e-mail)
 - ➊ <https://apps.powerapps.com/community/signup>
- ➋ Copilot Studio Homepage
 - ➊ <https://copilotstudio.Microsoft.com>
- ➌ Copilot Studio in a Day Hands on Lab
 - ➊ <https://aka.ms/CSIADstudent>
- ➍ The Bot Building Handbook
 - ➊ <https://aka.ms/PVAPlaybook>
- ➎ Copilot Implementation Guide
 - ➊ <https://aka.ms/copilotimplementationguide>
- ➏ PowerApps Developer Plan (US)
 - ➊ <https://powerapps.microsoft.com/en-us/developerplan>

Useful Resources

cont'd



aka.ms/trycopilotstudio

- ➊ MSFT Framework for building AI systems responsibly:
 - ➊ <https://aka.ms/MSFTAIFramework>
- ➋ Responsible Conversational AI – MSFT AI Lab:
 - ➊ <https://aka.ms/ResponsibleConvAI>
- ➌ Responsible AI Resources – Microsoft AI:
 - ➊ <https://aka.ms/Responsible-AI-Resources>
- ➍ Brainstorm Worksheet:
 - ➊ <https://aka.ms/ConversationalAIWorksheet>

Brainstorm worksheet

 **ENVISIONING YOUR BOT**
A BRAINSTORMING WORKSHEET

IDENTITY	
NAME IDEAS (Does it have a name? Or just a title?)	REGIONS (Where will the bot be used?)
ICON IDEAS (Brand icon, glyphs, full vector, etc.)	LANGUAGES (Will you support others besides your own?)
AUDIENCE	
WHO USES YOUR BOT <small>Who is your audience? Describe them here.</small>	3 REASONS THEY USE IT <small>What do people use your bot for? What are the top things it helps people do?</small>
	REASON 1
	REASON 2
	REASON 3
TONE OF VOICE <small>(These are the key characteristics of your brand—and therefore, the key characteristics of your bot.)</small>	
5 TRAITS WE EMBODY <small>What are your brand's top 5 characteristics? Write them down here.</small>	SIMILAR CHARACTERS <small>Identify actual people or characters who talk like your brand.</small>
	BRAND EXAMPLES <small>Are there any brands that have a voice similar to yours?</small>
5 TRAITS WE AVOID <small>What are the top 5 characteristics your brand avoids? Write them down here.</small>	
TRAITS <small>This is how your voice changes depending on the situation.</small>	
3 REASONS PEOPLE USE MY BOT <small>Now, take the things you wrote in the gray box and write them again down below.</small>	3 THINGS THAT COULD HAPPEN <small>For each reason someone might use your bot on the left, write down a specific situation one of your customers might find themselves in.</small>
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CONTENT STYLE <small>This is how your tone is expressed. Or: how your bot talks, like the words it says and how it says them.</small>	
QUICK LIST <input type="checkbox"/> Emojis <input type="checkbox"/> GIFs & memes <input type="checkbox"/> Images <input type="checkbox"/> Videos <input type="checkbox"/> _____	PUNCTUATION SENTENCE CONSTRUCTION CAPITALIZATION JARGON & SLANG

Microsoft

<https://aka.ms/ConversationalAIWorksheet>

[Conversational user experience in the Bot Framework SDK - Bot Service | Microsoft Docs](#)

A copilot for every Microsoft Cloud experience



Copilot for Dynamics 365

Copilot to assist roles within each line of business applications.



Copilot for Power Platform

Use natural language to accelerate the development of apps, automations and pages.



Copilot for Microsoft 365

Copilot assistant to accelerate productivity with Microsoft 365 apps and chat with your data



Copilot for Security

Receive tailored insights that empower your team to defend.



Copilot for Windows

Get answers and inspirations from across the web, supports creativity and collaboration, and helps you focus on the task



Copilot for GitHub

Increase developer productivity by helping you write code faster with less work.



Copilot for Microsoft 365

Embedded across Microsoft 365 apps



Create

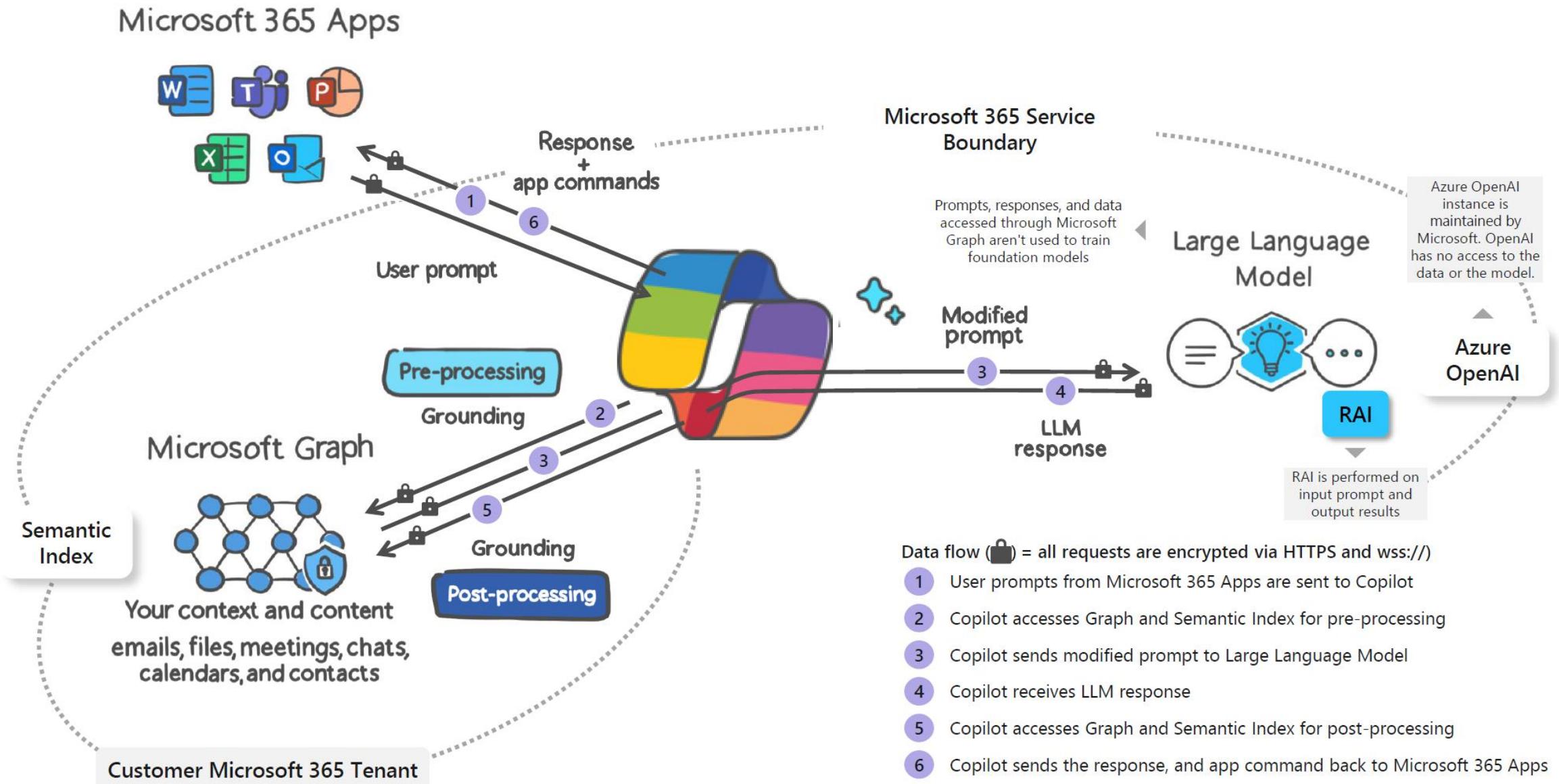
Edit

Ask

Catch up

Understand

Copilot for Microsoft 365 basic architecture



	For Individuals		For Organizations	
	Copilot	Copilot Pro	Copilot	Copilot for Microsoft 365
Foundational Capabilities	Free	\$20	Free	\$30
Web Grounding				
Commercial Data Protection				
Priority Model Access				
Copilot in Outlook, Word, Excel, PowerPoint, and OneNote				
Copilot in Teams				
Microsoft Graph Grounding				
Enterprise-Grade Data Protection				
Customization			Copilot GPT Builder	Copilot Studio

Commercial Data Protection applies when users are signed into their work account using their organization's Entra ID.

Better Together: Copilot for Microsoft 365 and Microsoft Teams Premium



365 and Microsoft Teams Premium		Microsoft Teams Premium	Copilot for Microsoft 365
Advanced collaboration capabilities in Microsoft Teams	Advanced meeting protection like custom watermarks, end-to-end encryption, and auto-background blur	✓	
	Advanced Collaboration Tools with priority account chat controls and advanced collaboration analytics	✓	
	Meetings that are branded to you and your organization's style	✓	
	Meeting templates , pre-configured by IT	✓	
	Advanced Virtual Appointment capabilities with SMS reminders, web join, scheduling	✓	
	Advanced webinars with registration, custom communication, and Green room	✓	
	Real-time translation of meeting captions and transcripts	✓	
	Intelligent recap to quickly catch-up on the most relevant information from meetings	✓	✓
	Copilot in Teams to ask questions to resolve topics, catch up during meetings, organize points		✓
	Microsoft Copilot UX		✓
Advanced AI in Microsoft 365 apps (beyond Teams)	AI-powered web grounding		✓
	Microsoft 365 Graph grounding (content and context)		✓
	Microsoft Copilot – Solve complex work tasks in one place..		✓
	Copilot Studio - Customized Copilot workflows experience using your business's data, logic, and actions		✓
	Copilot in the core Microsoft apps		✓
	Copilot in Word – Transform writing with efficiency and creativity		✓
	Copilot in PowerPoint – Turn your inspiration into stunning presentations		✓
	Copilot in Excel – Analyze, comprehend and visualize your data with ease		✓
	Copilot in Outlook – Stay on top of your inbox, manage meeting follow-up, and create impactful communication		✓
	Copilot in Loop – Unlock the power of shared thinking.		✓
	Copilot in OneNote – Revolutionize the way you plan, and organize		✓

*Intelligent recap will be rolling out to Copilot for Microsoft 365 in December 2023



All licenses include Commercial Data Protection and Microsoft 365 Security, Privacy, and Compliance.

Introduction to Conversational AI & Copilot Studio

Why Conversational AI



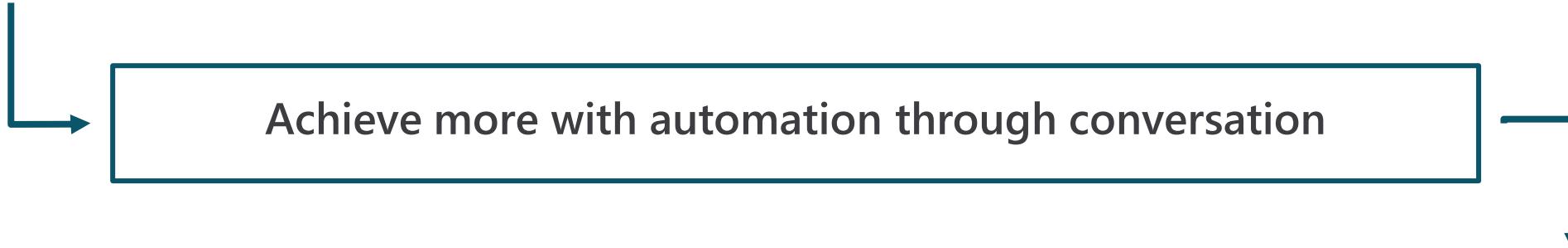
Growing number of communication channels
Need consistent messaging



Streamlined workforces
Higher workloads,
capacity constraints,



Higher customer/colleague demands
higher expectations, and



Optimize digital workforce



Faster time to value



More time for innovation



Copilot Studio

Your copilot, your way

Introduction to Conversational AI



Introduction to
Conversational AI &
Copilot Studio

Copilot Building
Basics

How to think about
Copilots

Building
Conversational
Experiences

Microsoft
Copilot Studio

Agenda

Momentum of conversational AI



By 2026, **30% of work activities** involving the use of technology will be **conversationally enabled**¹

By 2026, **conversational artificial intelligence** deployments within contact centers will **reduce agent labor costs by \$80 billion**²

By 2026, **up to 80% of organizations' digital experiences** will be delivered to consumers **via virtual people**²

Source:

1. 2022 Gartner® - Forecast Analysis: Hyperautomation Enablement Software, Worldwide,

2. 2022 Gartner - Forecast Analysis: Hyperautomation Enablement Software, Worldwide

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Copilot Building Basics

Is a copilot just a chatbot?

Conversational AI

Chatbot

Conversational experience using trained NLU models

Common to be text based

Data queried with APIs vs grounding

Prebuilt content and topics by makers

Embedded into sites, but siloed

Context holding

Copilot

Evolution of chatbots as conversational assistants powered by large language models and generative AI to assist in your line of work.

Natural, multimodal interface

Enables more than just text formats.

Grounding in multiple data sources

Works with your internal and external data sources

Generative content capabilities

Generative AI powering Copilot building and response generation

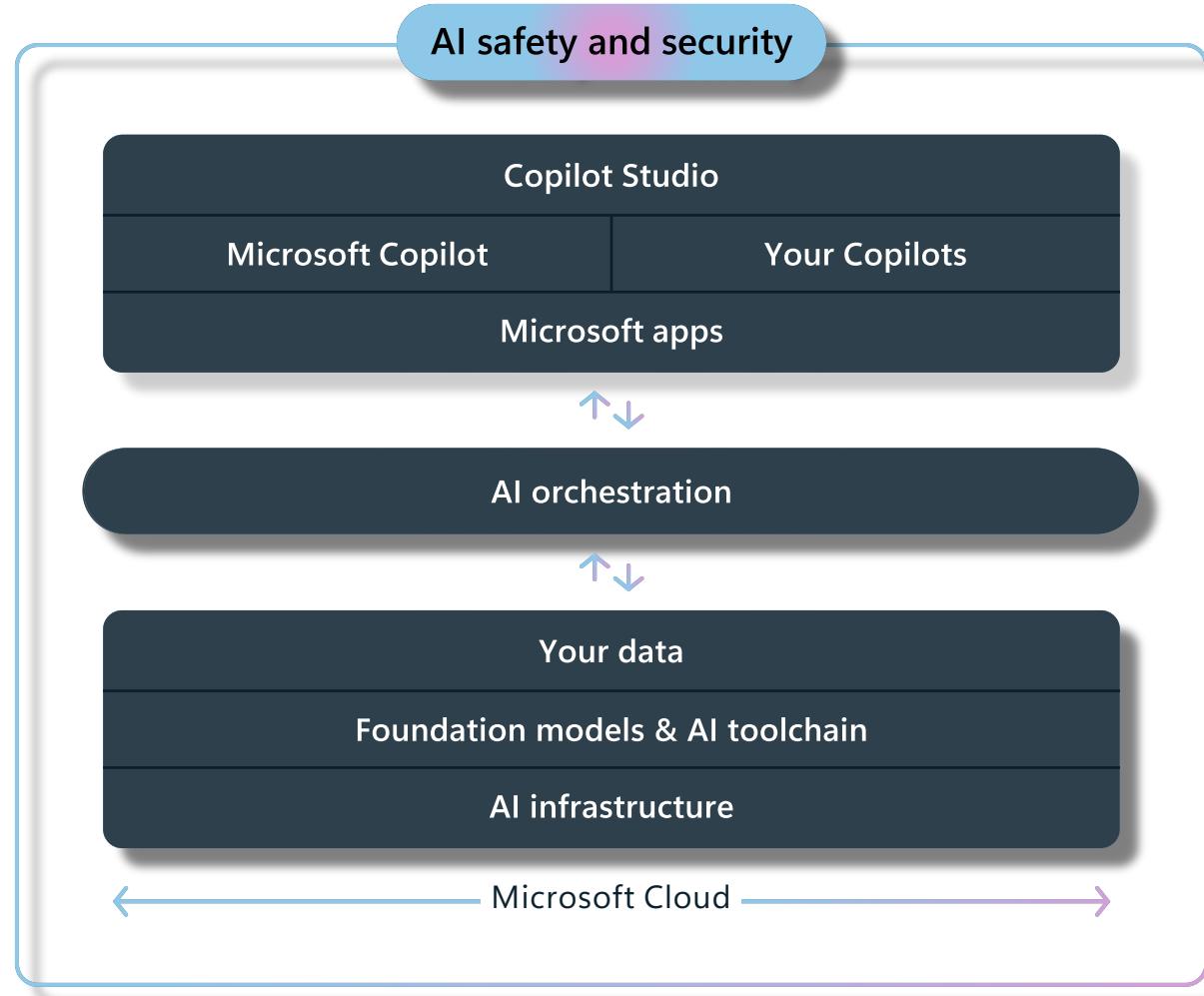
Contextual interactions

Connected to the app experience it lays

Responsiveness and adaptability

Flexible to configure to context of experience.

Copilot stack





Microsoft Copilot Studio

Build your own copilot

Create and publish a custom copilot for your organization using the intuitive building experience enhanced with large language models and generative AI

Customize Microsoft Copilot

Extend and customize 1st party Microsoft Copilots with your own enterprise scenarios. Copilot Studio will be included with the Microsoft 365 Copilot SKU.

Connected platform

Integrates and exposes various Microsoft's conversational AI technology stacks - integrated with Azure AI Studio, Azure Cognitive Services, Azure Bot Framework, Power Platforms AI models and more

Manage copilot experiences

Governance and control features to monitor usage with full visibility of customizations, standalone copilots as well as who is building and customizing them.

The screenshot shows the Microsoft Copilot Studio interface. At the top, it says "Copilot Studio" and "Northwind Trader". The left sidebar has a navigation menu with items like Home, Building blocks, GPTs (selected), Topics, Plugin actions, Prompts, Copilots, Create a copilot, Extend Microsoft Copilot, Publish, Analytics, Settings, AI integration tools, Channels, and Test your copilot. The main content area is titled "Northwind Trader" and "View solution (Northwind Trader copilot prod)". It features a section titled "Boost your conversations (preview)" with a sub-section "Enter your website" and buttons for "Use generative answers" and "Advanced options". Below this, there are three preview cards: "Extend a Microsoft Copilot (preview)", "Add plugins for dynamic chaining (preview)", and "Meet people where they are". Each card has a "Go to [action]" button at the bottom.

Building Conversational Experiences can be broken up like this....

Conversational design

How to think about bots

**How to design
Conversational AI
experiences**

**Key functional areas to
consider**

Language

Text & Speech

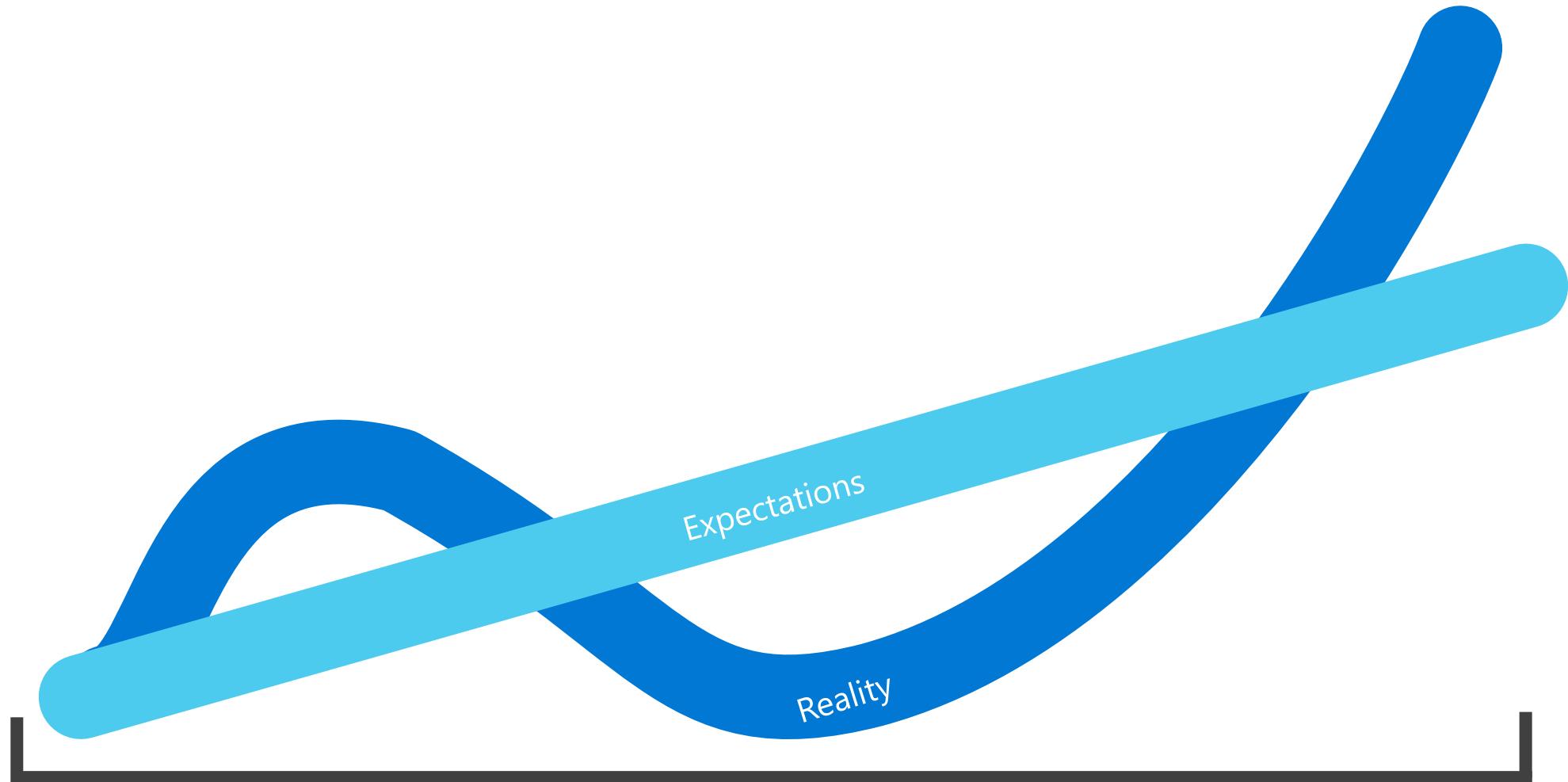
**Generative AI
& NLU**

Authoring

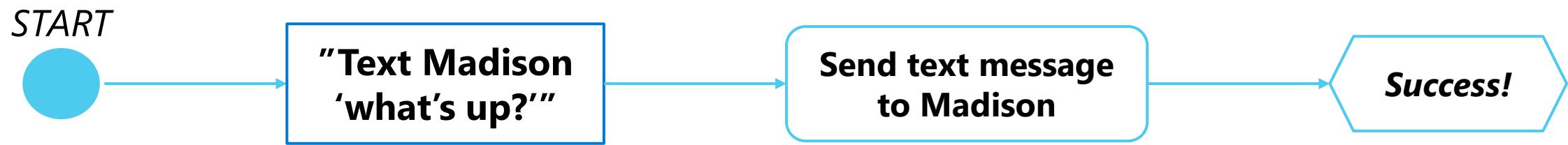
Channel experiences

How to think about Copilots

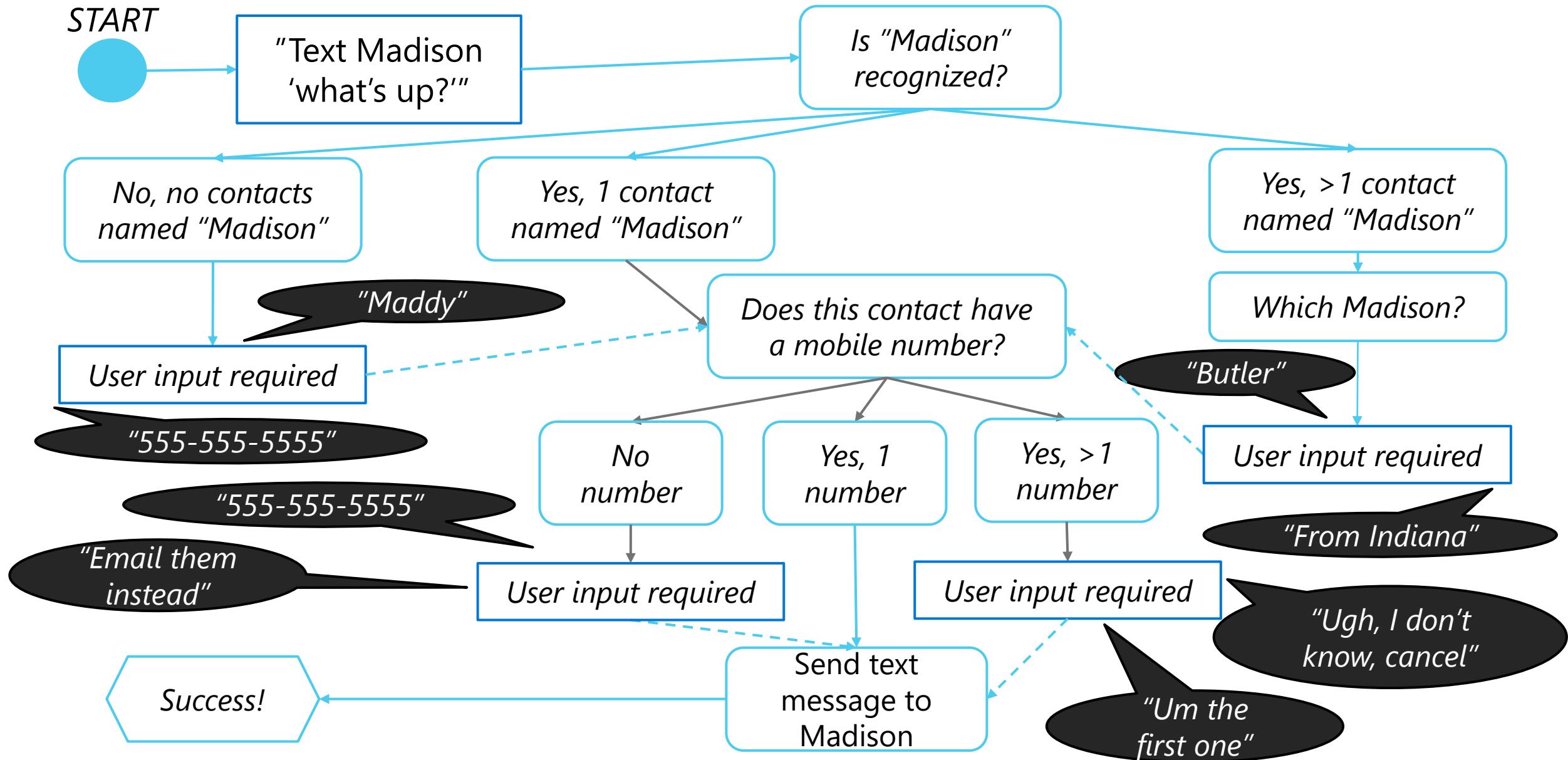
Copilot rollout



It's easy to know where a conversation begins and ends...

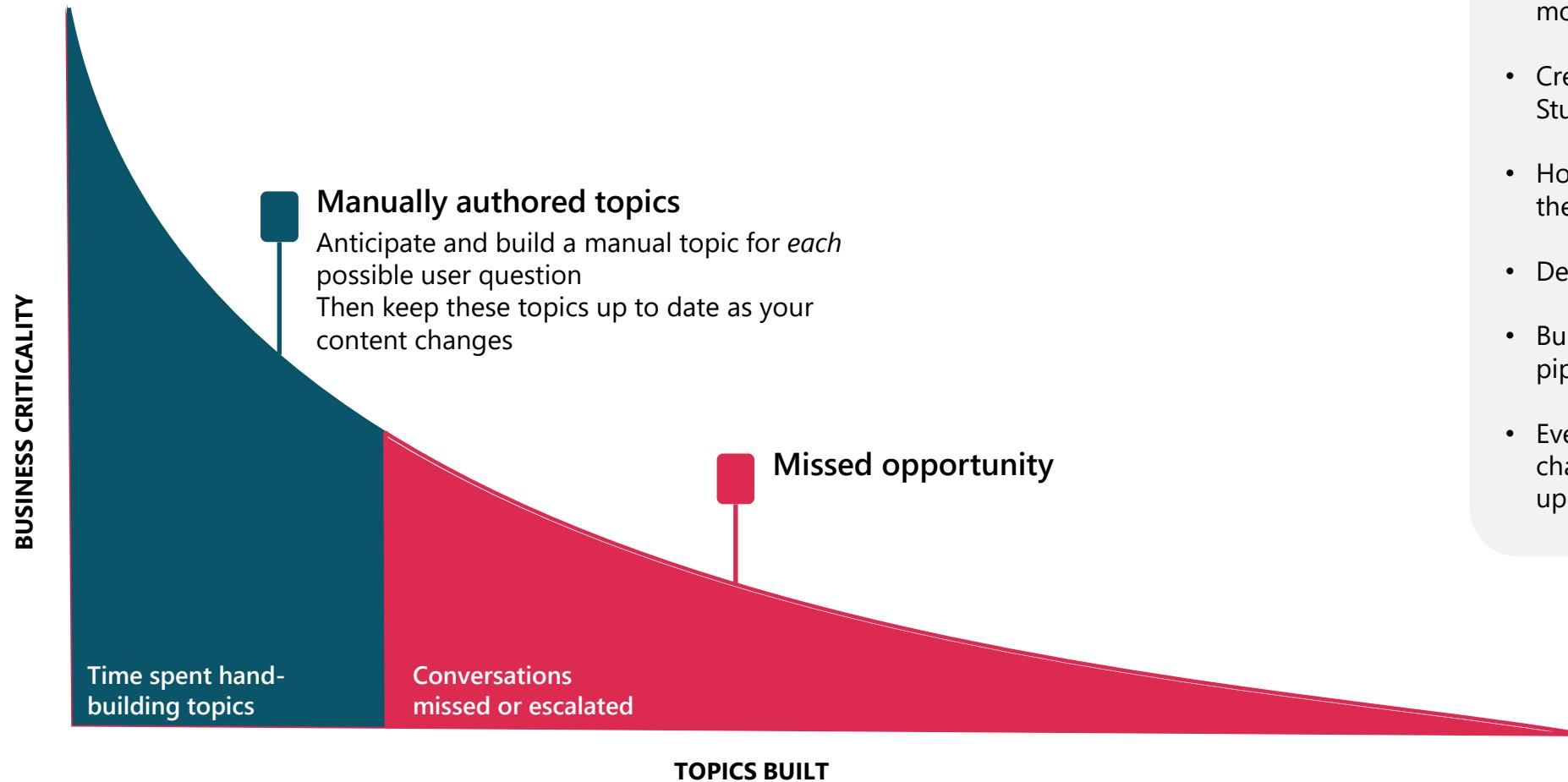


The middle is the hard part...



Adding Generative AI

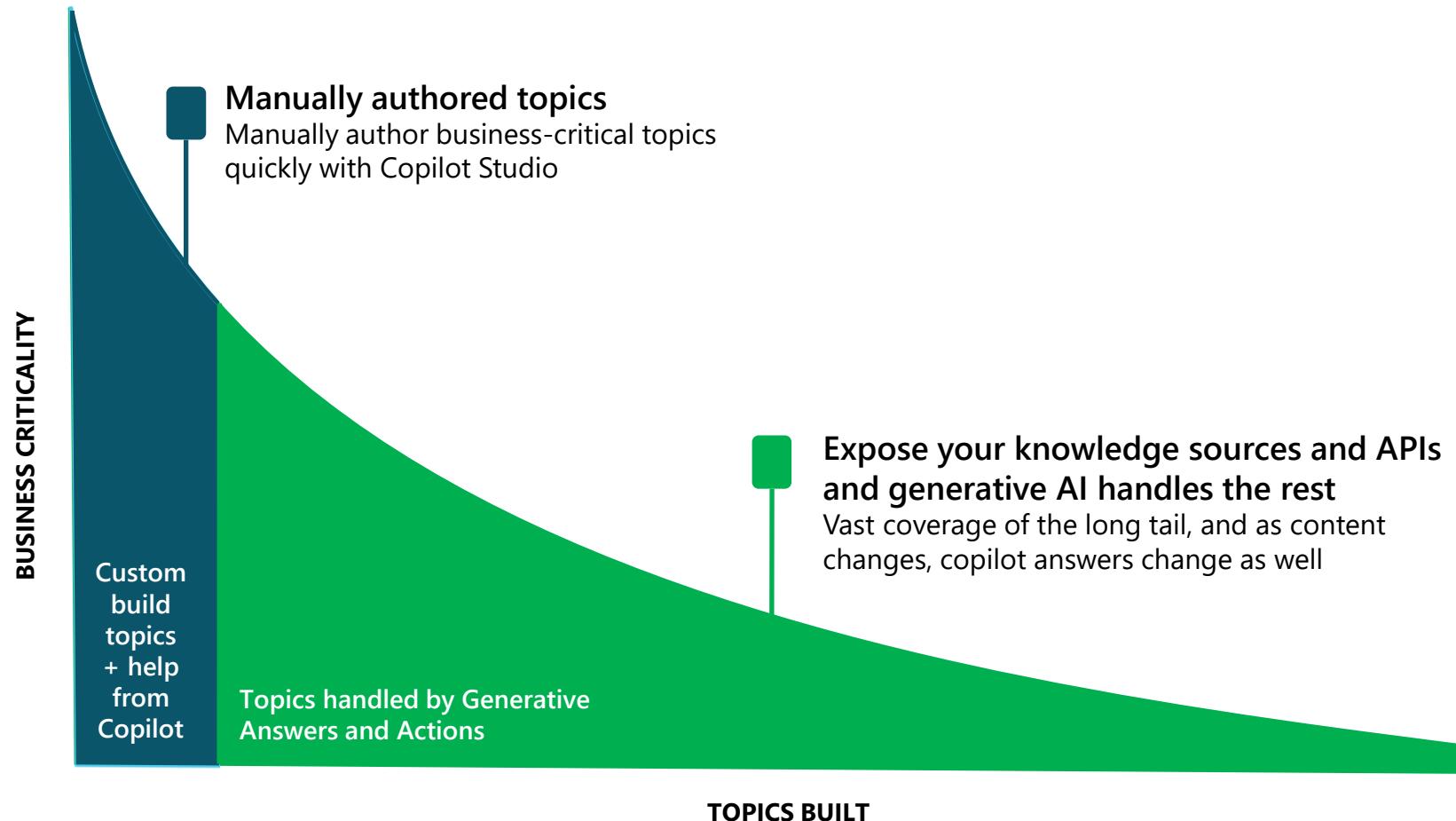
Generative AI is changing building



Traditional (e.g. Azure)

- Create Azure tenant and infra
- Annotate thousands of utterances and conversations to build a custom NL model
- Create topics in code using Visual Studio and BF SDK
- Host Azure Bot Service and instantiate the appropriate channel
- Deploy your copilot to the service
- Build your own custom analytics pipeline
- Every time your knowledge content changes (e.g. different hours) go and update the copilot in code

Generative AI is changing building



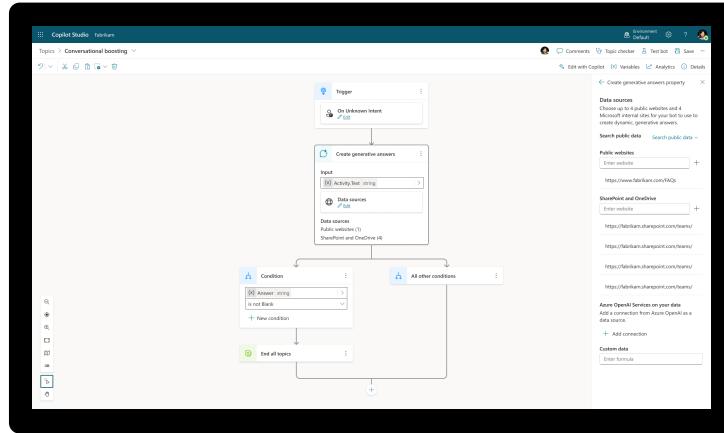
Copilot Studio with Generative AI

- Full E2E SaaS – no infra to host or manage
- No explicit NL training or custom model required, comes with powerful large language model
- Point to a knowledge sources and have a useful bot in minutes with Generative AI
- Customize your copilot with business-critical topics using easy to use graphical interface and 1000s of pre-built connectors, or call custom APIs
- Developers, low-code users can collaborate inside the same canvas with graphical multi-authoring and code side-by-side
- Publish to the channel of your choice in minutes with a few clicks

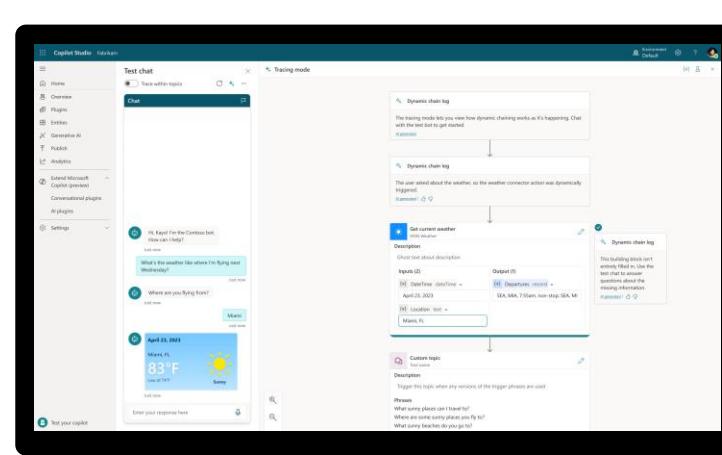
Generative AI in Copilot Studio

Powered by Azure OpenAI Service

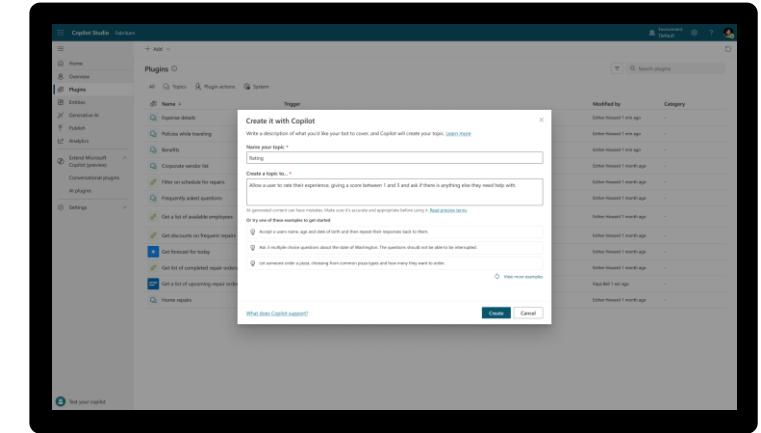
TO ANSWER



TO ACT



TO BUILD



Generative Answers

Dynamically generate multi-turn answers based off an organization's content in real-time.

Public Preview

Generative Actions

Generate dialog and take action through dynamically chaining existing building blocks and plugins.

Public Preview

Generative Building

The Copilot assistant helps build, design and modify copilot topics through natural language.

Generally Available

Generative Answers

Out of the box, your copilot answers questions based on the content your organization has already invested in

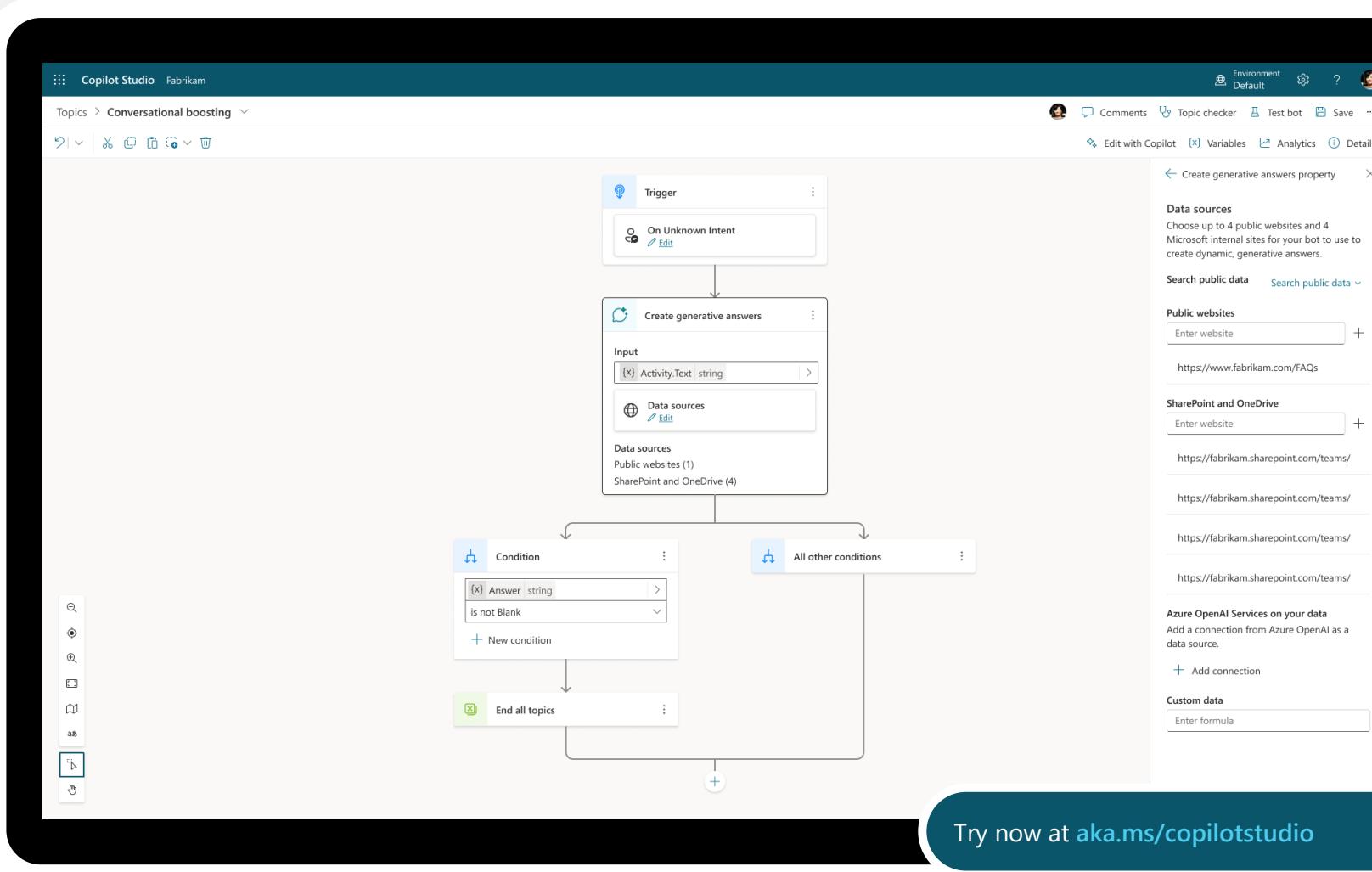
Always up to date, your copilot uses your latest published content for each request; no more maintaining info in two places

Enable multi-turn chat over your own internal and external knowledge sources, files and sites with generative answers

Supports content on the **web, SharePoint, Azure Open AI** on your data, and **direct file upload** and custom calls to backends

You can even pull data **from an API or other backend system** and enable generative chat over it

Generally Available



Considerations & Discovery with Generative AI

Copilot Studio / Azure OpenAI Service on Your Data / Azure OpenAI Service Comparison

	Data Store	Data Access	Data Security	Prompt Control	Responsible AI	Client Access	Analytics and Monitoring
Copilot Studio (Generative Answers)	<ul style="list-style-type: none">Public WebsitesSharePointImported FilesDataverse3P APIs	Automatic with nothing to host or manage	<ul style="list-style-type: none">On-behalf-of usersAPI Key	<ul style="list-style-type: none">No need to write your own promptsResponse toneOutput formattingCustom prompts at node	<ul style="list-style-type: none">Cognitive Services ModerationProvenance ValidationAzure OpenAI Service Content Moderation	<ul style="list-style-type: none">WebTeamsFacebookSlackBot Framework ChannelsAPIs	<ul style="list-style-type: none">Built-in analyticsSelf-hosted Azure Application Insights connectivity with custom events
Azure OpenAI Service - On Your Data	<ul style="list-style-type: none">Configured pipelines to import filesCustom Azure Cognitive Search Index	Automatic through self-hosted data stores and indexes	Any through custom data security	<ul style="list-style-type: none">No need to write your own promptsResponse toneOutput formatting	<ul style="list-style-type: none">Grounded to your dataAzure OpenAI Service Moderation	<ul style="list-style-type: none">APIsSelf-managed Web AppPower Virtual Agents	Any through custom developed analytics
Azure OpenAI Service	Any	Manual through custom data access	Any through custom data security	Requires custom prompt authoring	Azure OpenAI Service Moderation	APIs	Any through custom developed analytics

Questions to help you get started

- What does it mean for your bot to truly answer their questions?
- What are some unexpected responses your bot may encounter?
- What data might you need access to and need to integrate with various systems to do so?
- What assumptions do your users have when they engage with your bot?
- What context do your users have when talking with your bot, and does this solution fit that mental model?
- How can you design a bot that is easy for your users to navigate and find the answers they are looking for?

Building Conversational Experiences

Who is a “user”?



User

A person who uses a product or service.

Things to keep in mind

- Who is your user?
- What types of conversations will your bot be having with this audience?
- And lastly where will these conversations take place?
- Don't forget who you're designing for

Users talking to bots

They know they're not talking
to a person.

They know it's not reciprocal.

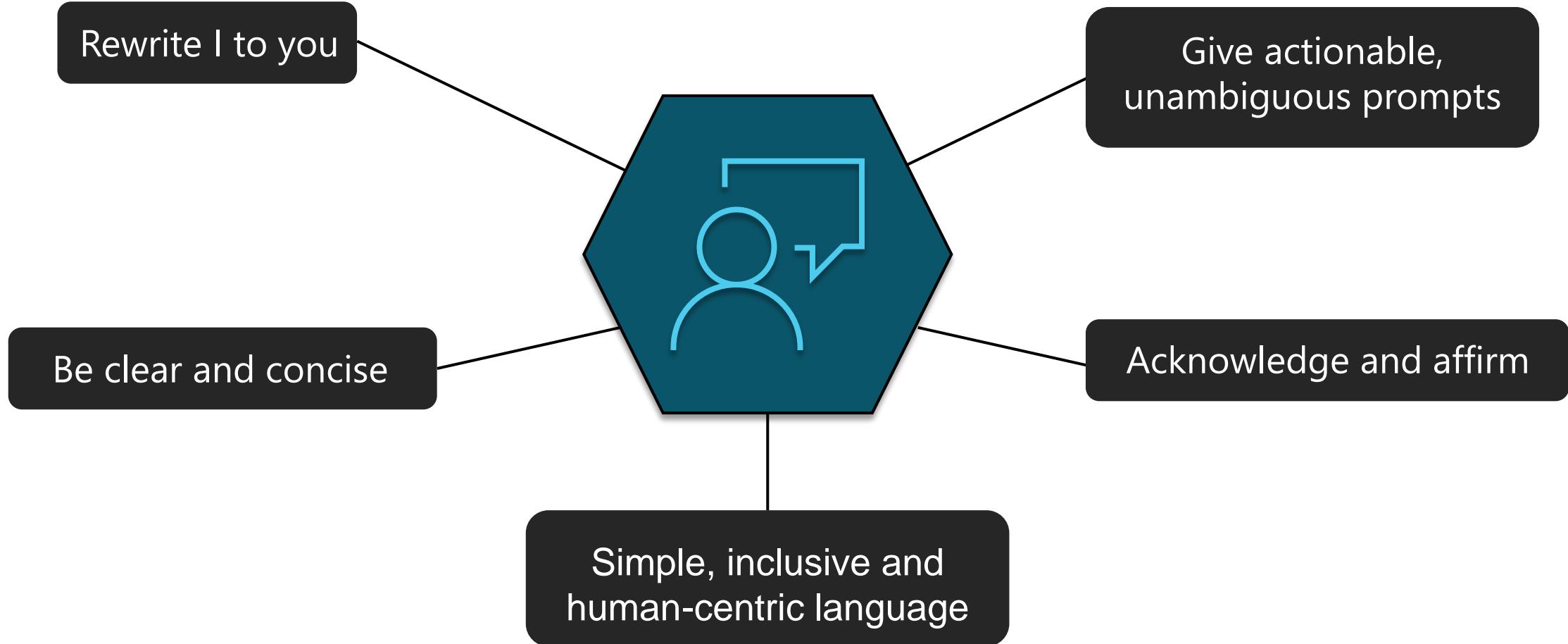
But their emotional response is
very real.



Useful Conversational Experiences

- Pick a scenario that will delight and will be requested repeatedly: is the scenario conversational?
- Does the bot easily solve the user's problem with minimal back and forth turns?
- Is the bot discoverable and easy to invoke?
- Mimic human to human conversation in your design of the transcript
- Prototype to uncover what is working
- Create a test plan

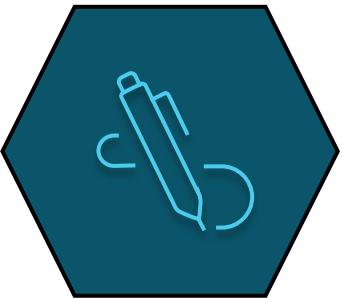
Focus on user-centric language



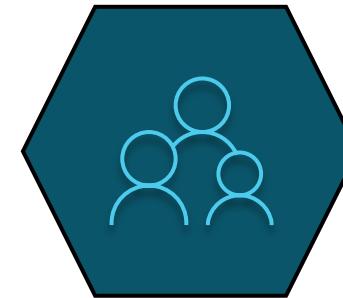
Best practices



**Understand your
user**



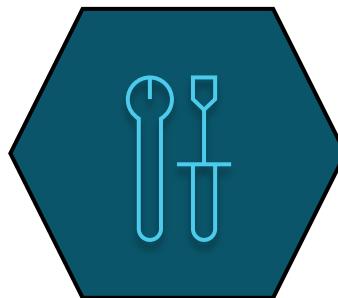
**Keep it simple and
clear**



Be inclusive

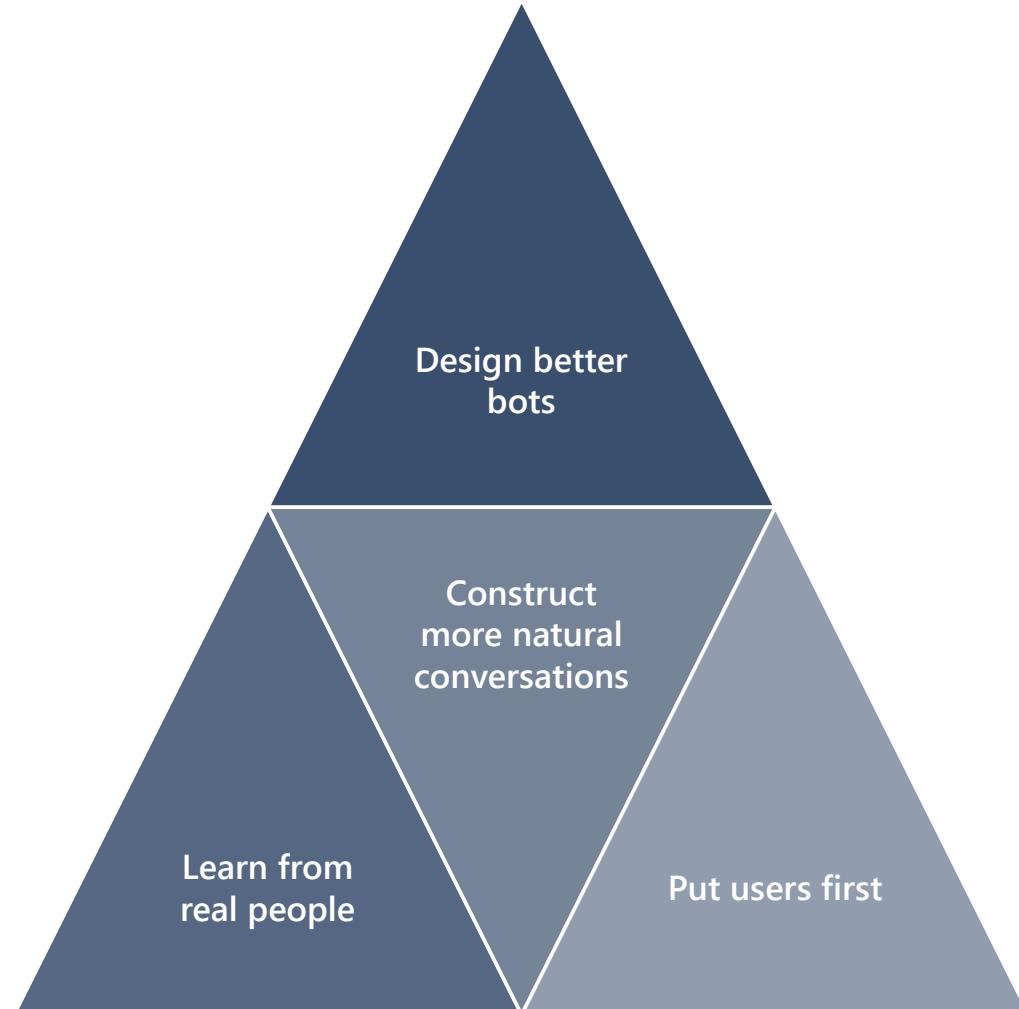


**Personality is
important**



Use the right tools

Essence of inclusive design



Bot brand & personality



What's my name?

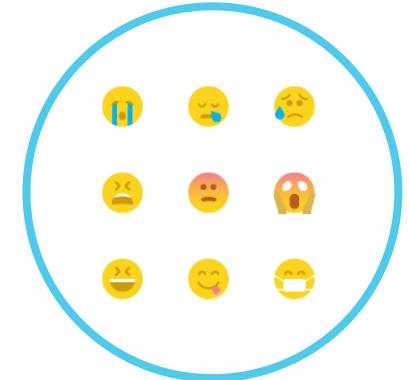
Think about your name and how it reflects your brand and the type of bot you are designing.



How do I look and react?

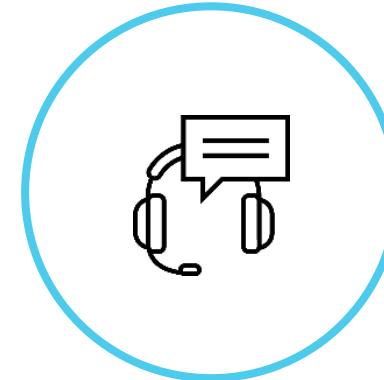
Just like a mobile app your assistant icon is really important.

The interactive changing state of your bot is highly recommended: listening, waiting, responding etc.



How should I sound?

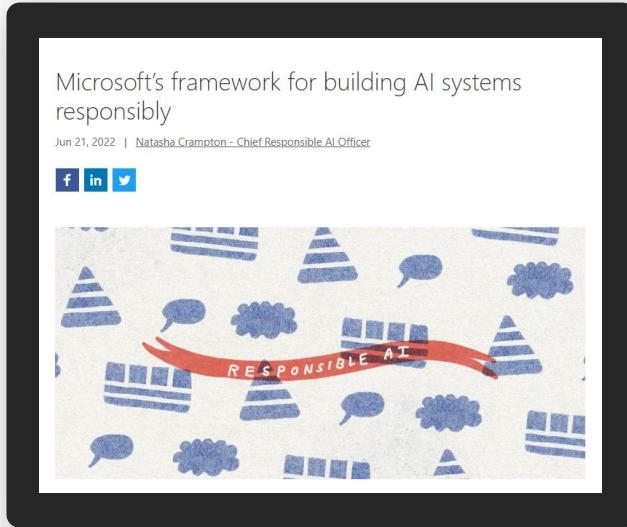
Tone of voice is the primary way you will inject your brand into a bot.



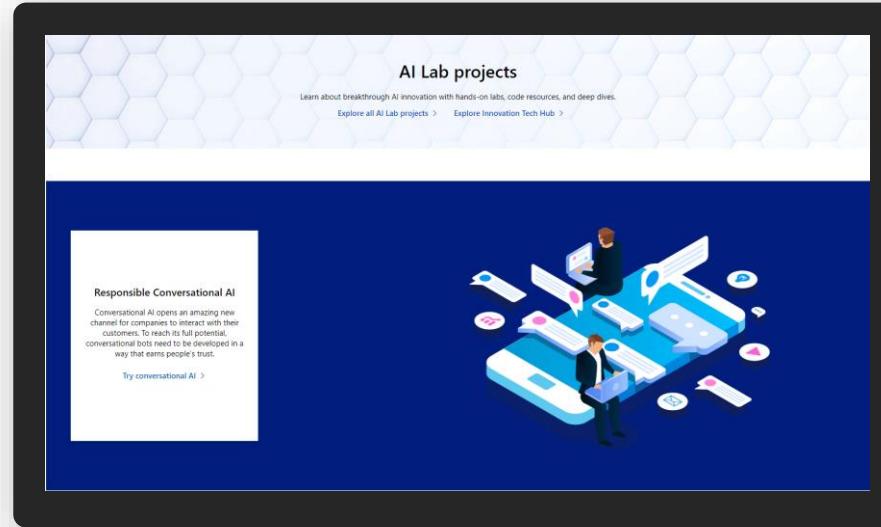
When should I ask for help?

No matter how smart your bot is, there will be cases where you still need to let a human take control of the conversation.

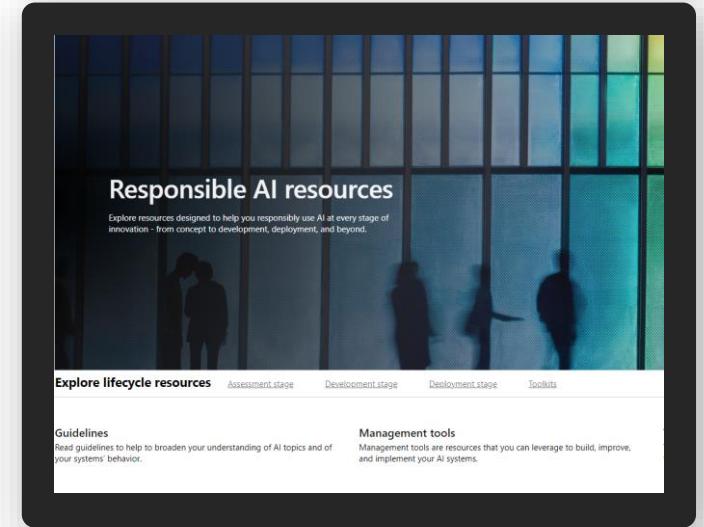
Ethical considerations



**Microsoft's framework
for building AI systems
responsibly**
aka.ms/MSFTAIFramework



**Responsible Conversational AI –
Microsoft AI Lab**
aka.ms/ResponsibleConvAI



**Responsible AI Resources –
Microsoft AI**
aka.ms/Responsible-AI-Resources

Brainstorm worksheet

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Microsoft

<https://aka.ms/ConversationalAIWorksheet>

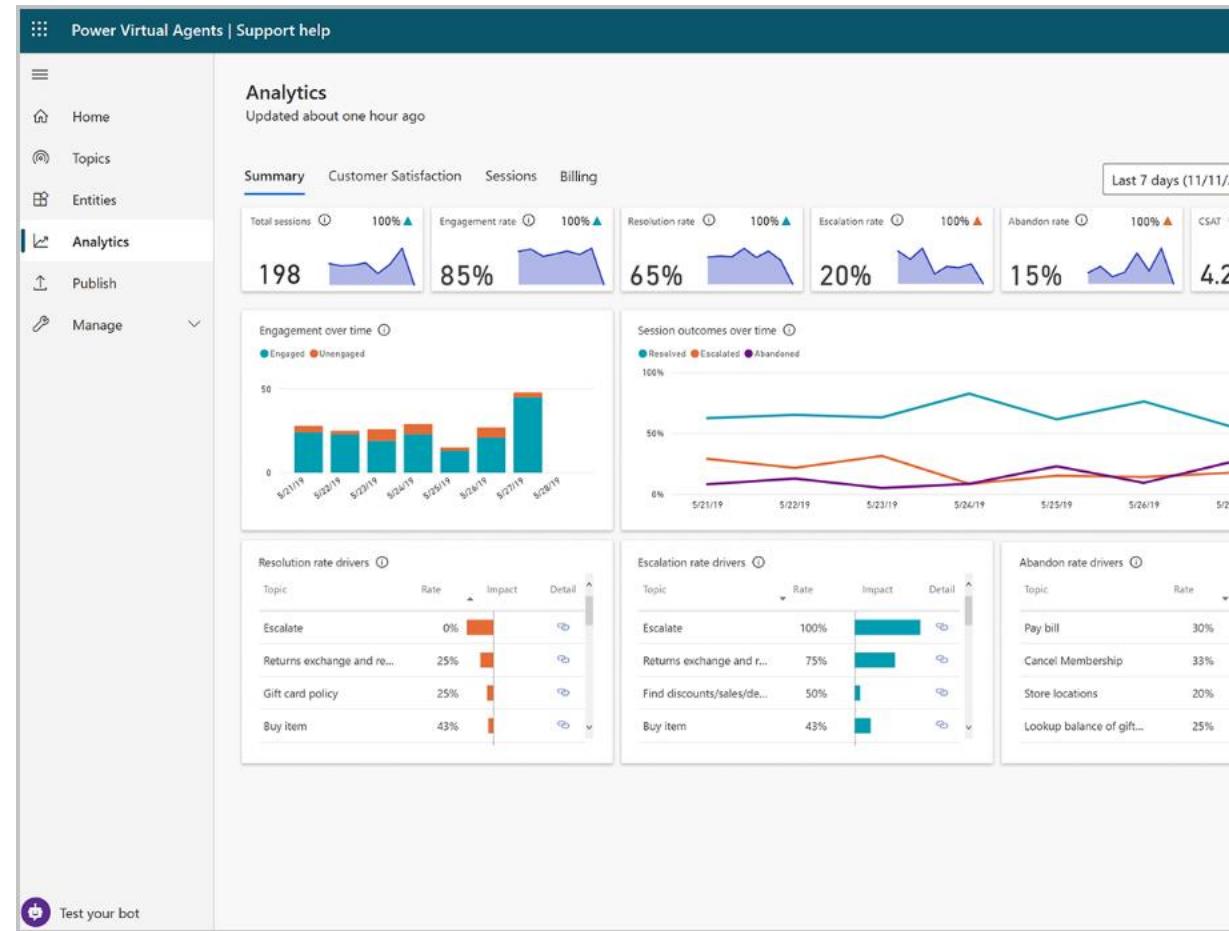
[Conversational user experience in the Bot Framework SDK - Bot Service | Microsoft Docs](#)

Align the bot with your organization's goals

- Handling repetitive information requests when a skilled human agent is not required
- Reducing the time, it takes to get answers to end users
- Lowering support call volume, while also handling high call volume
- Improving support KPIs
- Using a bot as part of the brand strategy

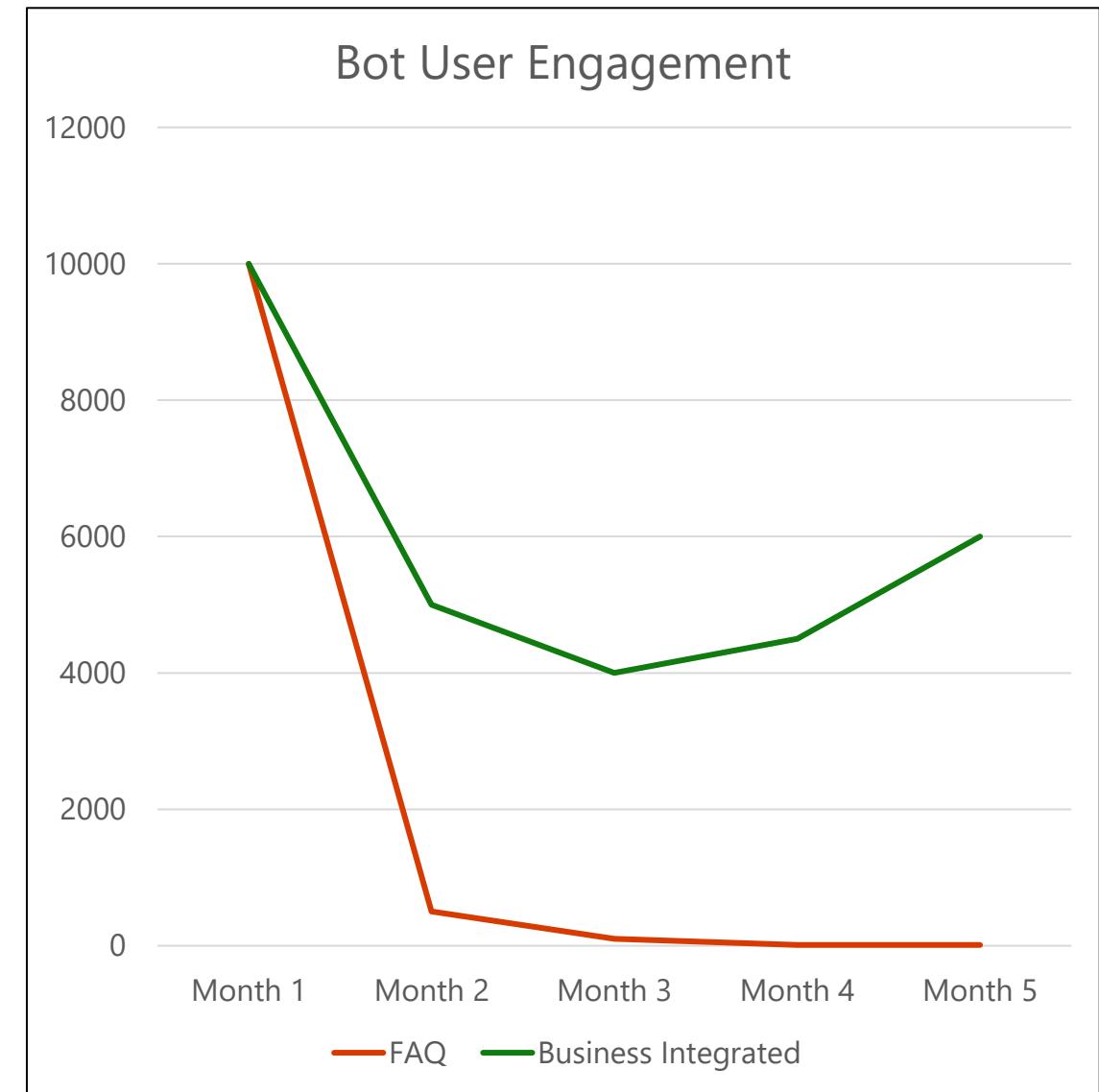
Getting Started Right

- Identify the right requirements
- Start small and scale up
- Track Analytics for ongoing improvements
- Utilize the Copilot Studio implementation guide:
<https://aka.ms/copilotimplementationguide>



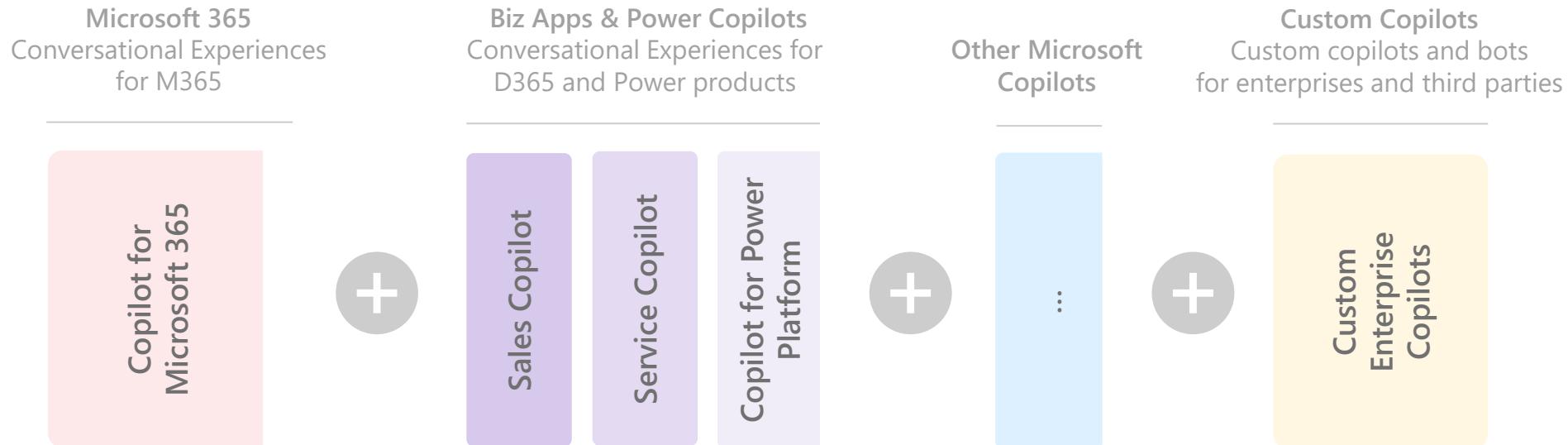
Build Engaging Bots

- FAQ vs Business Integrated
- Leverage Power Automate Connectors
- Value beyond Form Filling
- High Deflection Rate



Microsoft Copilot Studio

Copilots and Conversational AI



Bot
Framework
/ SDK

Bot Service
Channels

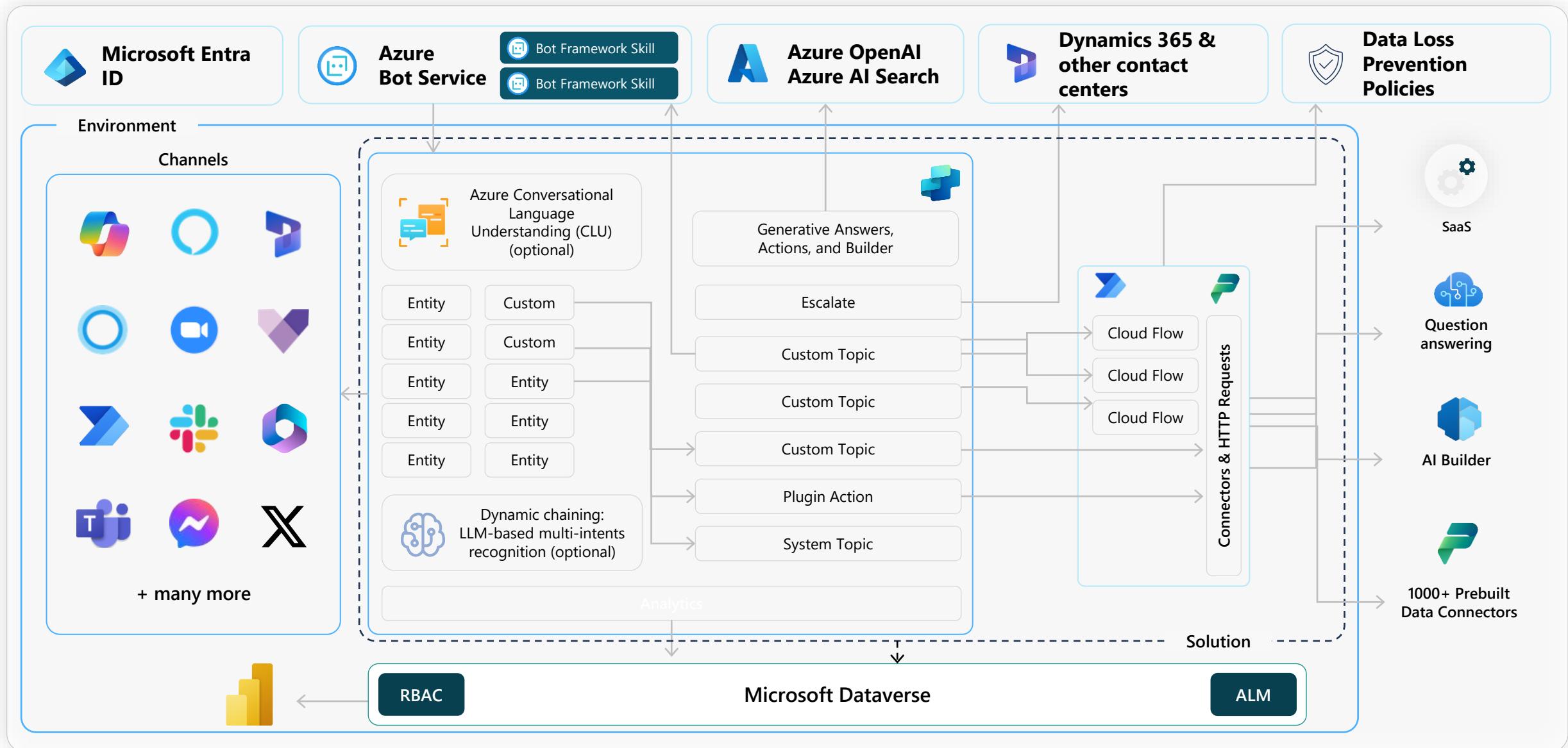
Azure AI
Studio

Azure
Cognitive
Services

Power
Platform
Connectors

AI Builder

Copilot Studio Architecture



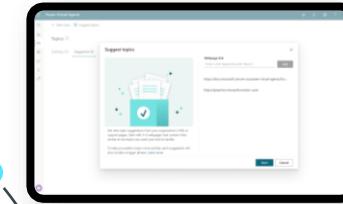
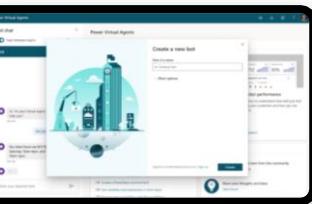
Create copilot with E2E SaaS and single pane of glass

Conversational Services

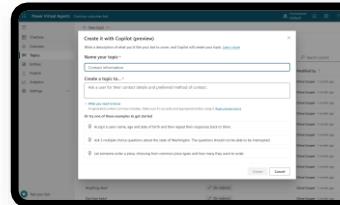
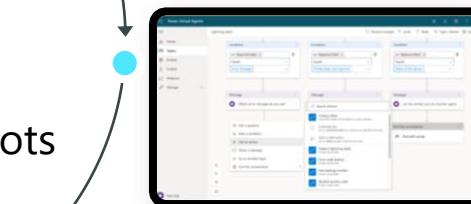
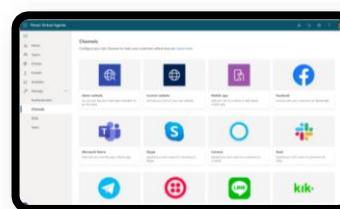
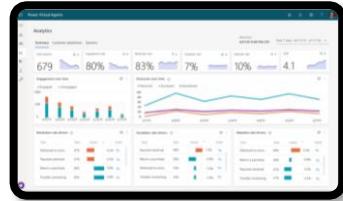
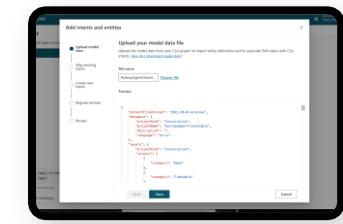
Integrate with Azure AI Studio, Azure Cognitive Services, Bot Framework and more

Monitor and Improve
with Rich out-of-the-box telemetry and analytics

Publish the copilot to
multiple channels, live
instantly on the SaaS service



Copilot Studio
Build your own copilots



Chat over knowledge with Generative AI

Use generative answers and custom GPTs to provide enterprise specific answers over your files, websites, and internal shares

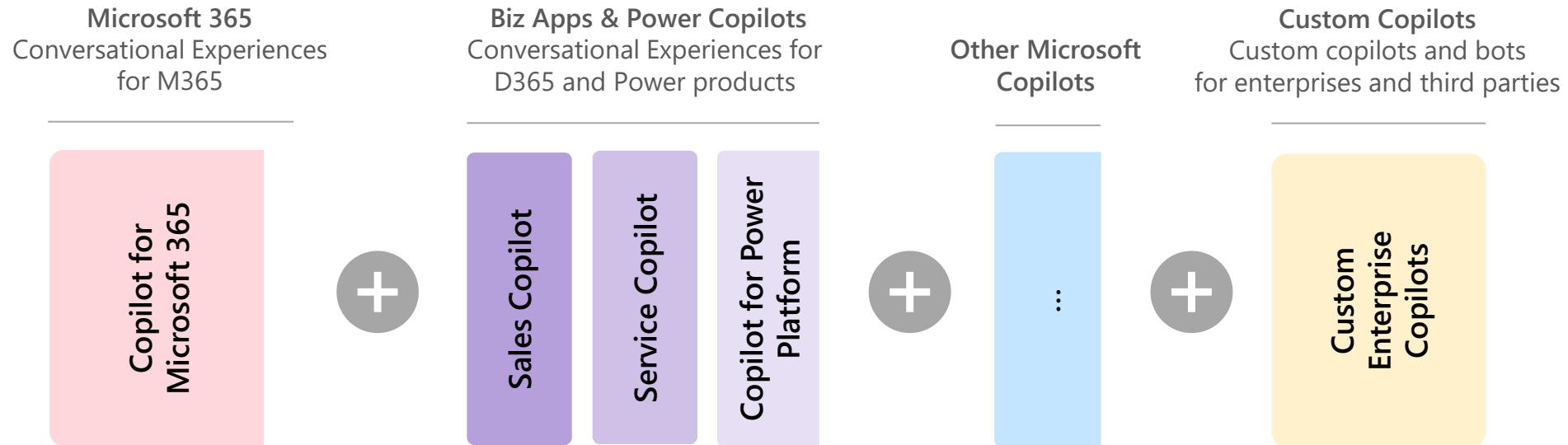
Create specific topics

Supplement generative answers with specific, curated topics. Build them easily with the powerful graphical studio

Actions & Plugins

Create actions , plugins, or use pre-built Power Platform and OpenAI connectors to call your backends and APIs

Copilots and Conversational AI



Microsoft Copilot Studio

Extend and customize 1st party copilots | Build custom Copilots

Bot Framework / SDK

Bot Service Channels

Azure AI Studio

Azure Cognitive Services

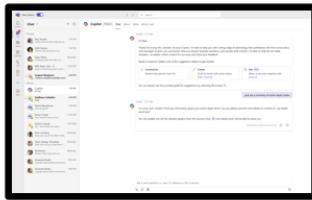
Power Platform Connectors

AI Builder

Customizing Copilot

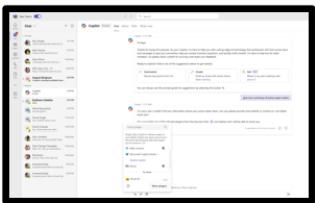
Microsoft Copilot

Answers based on your enterprise data, but cannot natively answer other queries

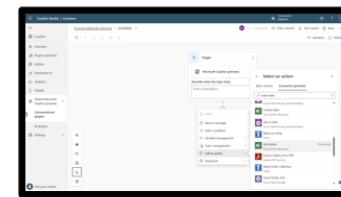


Ask again

Microsoft Copilot is now instantly capable of handling the previously unanswered query.



Copilot Studio
The fastest way to build and extend powerful Generative AI Copilots

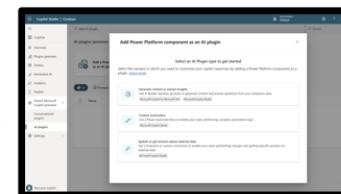


Extend in Copilot Studio

Add reusable AI Plugins (based on pre-built / custom connectors, AI Prompts and Power Automate Flows) or build Conversational Plugins

Publish back to Microsoft Copilot

Publish and enable your new plugin in Microsoft Copilot in minutes.



Build a Conversational Plugin

Use the state-of-the-art dialog builder. Using 1000's of connectors, combine multiple data sources and manipulate data



Copilot Studio

	Internal custom copilots	Customer facing copilots	Extend Copilot for Microsoft 365
World Class UX	Declarative	Rich Response	Intuitive
Logic + Automation	Low code logic	Generative Answers + Actions	Ease of use
Next-Gen AI	Prebuilt LLM	Generative AI	Natural language to build
Connected experience	Microsoft Copilot	Power Platform	Custom Azure Skills
Copilot Lifecycle	Test Pane	Collaboration	Proactive suggestions
Security + Governance	Trusted identity	Full visibility	Bring your own Model (BYOM)*
	1000+ Connectors	Solution Management	Azure AI Studio
	Advanced RBAC	ALM Automation	Granular DLP control
Microsoft's end-to-end copilot building platform			

Automation studio



The screenshot shows the Power Virtual Agents interface. On the left, a sidebar lists navigation options: Home, Topics, Entities, Analytics, Publish, Manage, Details, Channels, Security, Skills, and AI capabilities. Below this is a button labeled "Test your bot". The main area is titled "Lightning deals" and displays a process flow. It starts with three "Condition" blocks, each with a dropdown menu. The first condition checks if "Response1 (Text)" is equal to "Error message". The second checks if it's equal to "Printer does not respond". The third checks if it's equal to "None of the above". Each condition leads to a "Message" block. The first message asks "Which error message do you see?". The second message is a "Search actions" block. The third message says "Let me connect you to a human agent.". From the second message, a dropdown menu is open, showing options like "Create a flow", "Authentic", "Skill or skill action", and several "View flow details" items for "Today's lightning deals", "Error code lookup", "Get tracking number", and "Student promo code". At the bottom of the flow is an "End" block labeled "End of conversation".

Power Automate's digital process automation is included in Power Copilot Studio with 1000+ prebuilt data connectors and automation templates.

3rd party connectors, including custom and on-prem

Connectivity



1 Discover

2 Automate

Use process mining to identify bottlenecks and opportunities for automation

With the Copilot Studio Process Advisor template, get a deeper insight into copilot conversation flows.

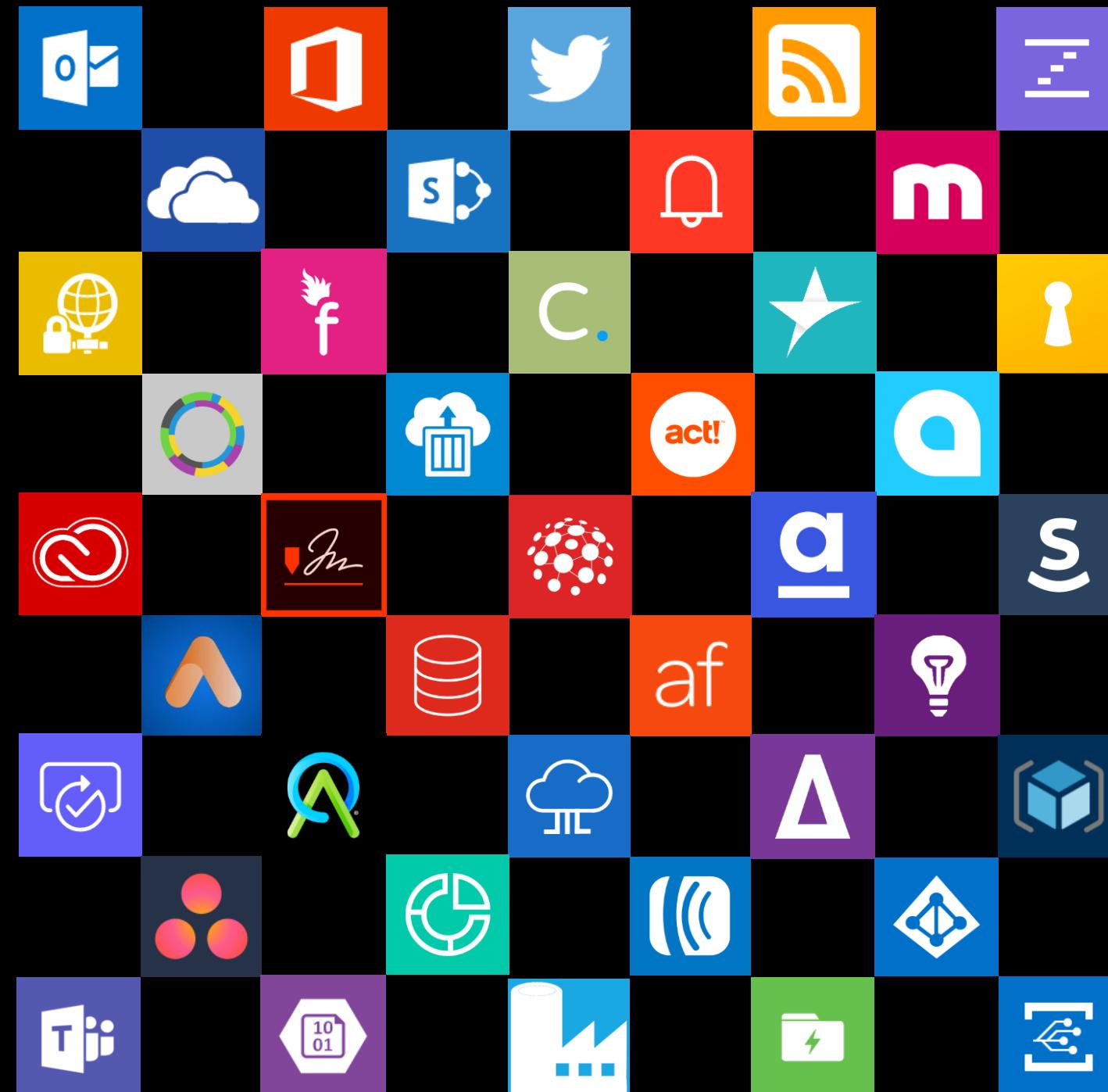
Create solutions by automating business processes with advanced AI, Digital Process Automation, and Robotic Process Automation.

Embed your automation flows directly into the conversation to drive action.



1000+ connected experiences

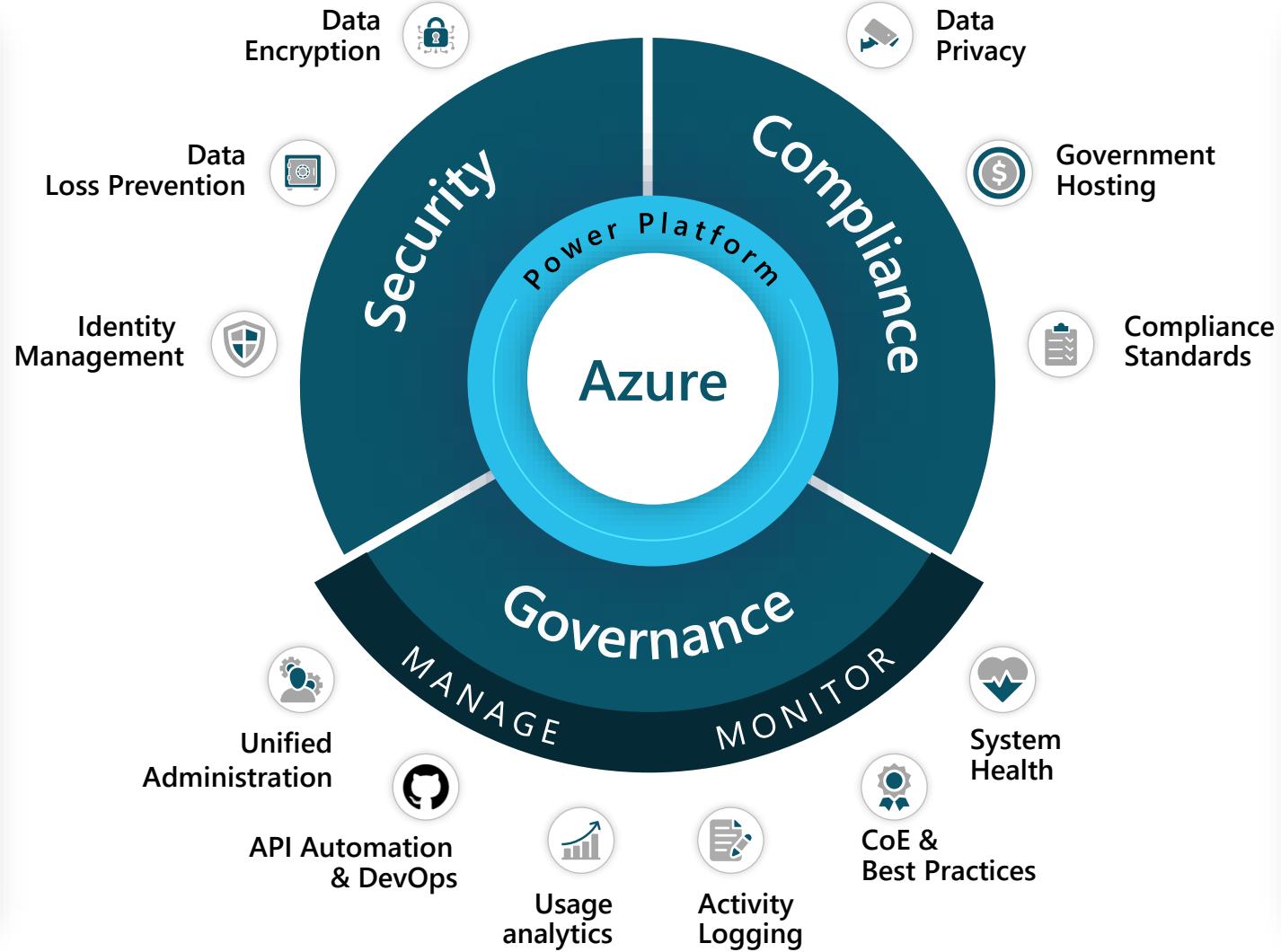
Connect to more than 1000+ 1st and 3rd party services with built-in connectors for everything from Adobe to Zendesk to on-premises solutions.



Robust, secure and compliant hosting platform

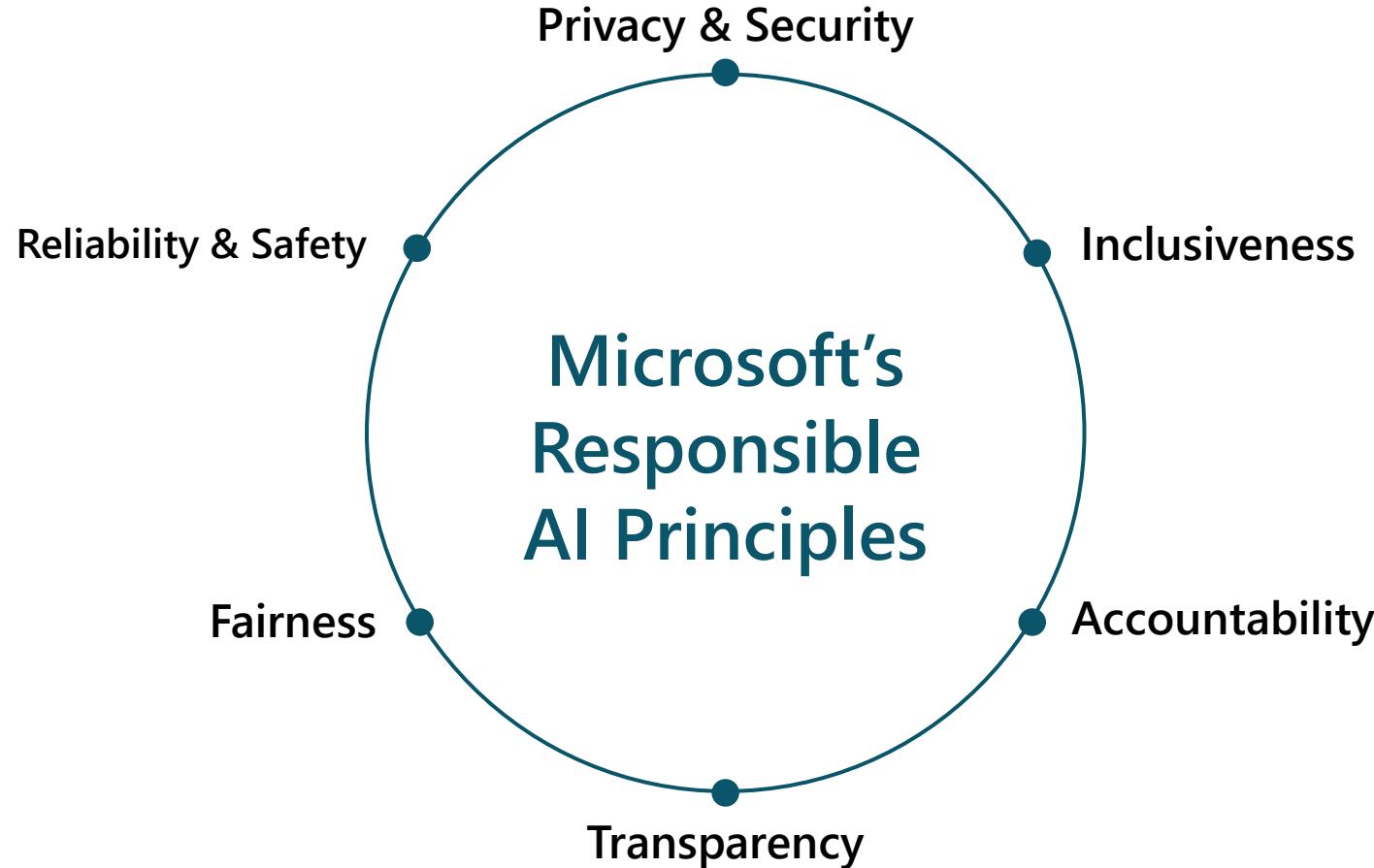


Compliance leadership
with standards and
commitments
including ISO 27001,
FedRamp and EU
model clauses



No standing access to data
transparent
operational model
and 99.9% financial-
backed uptime
guarantee

Microsoft's Responsible AI principles



Building blocks to enact principles



Customer Copyright Commitment

Use Copilot services with confidence

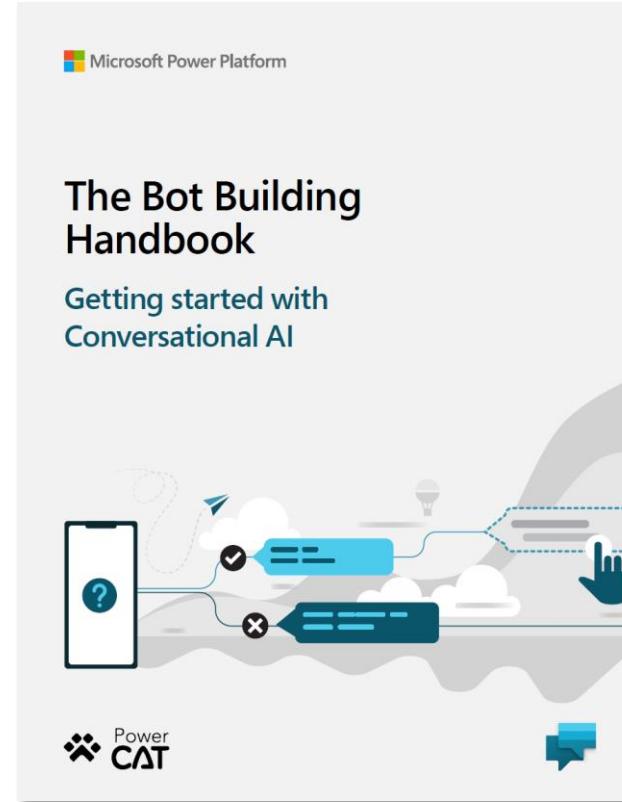
We stand behind
our Copilot
customers

We are sensitive
to the concerns
of authors

Copyright
guardrails are built
into the product

How do you start a project?

- Use case building**
- Building your team**
- Project planning**
- Bot building**
- Testing**
- Management**
- Go-live**
- Post-go live**



[Https://aka.ms/PVAPlaybook](https://aka.ms/PVAPlaybook)

Getting started with Copilot Studio

Copilot Studio Information Architecture

Microsoft Dataverse Environment

Copilot (0, 1 or more copilots in an environment)

User Topics (1 or more in a copilot)

Conversation Tree (1 per topic)

Trigger Phrases

Prebuilt Entities

Custom Entities

Power Automate Flows

Bot Framework Skills

System Topics (8 pre-defined in a copilot)

Conversation tree

Trigger Phrases

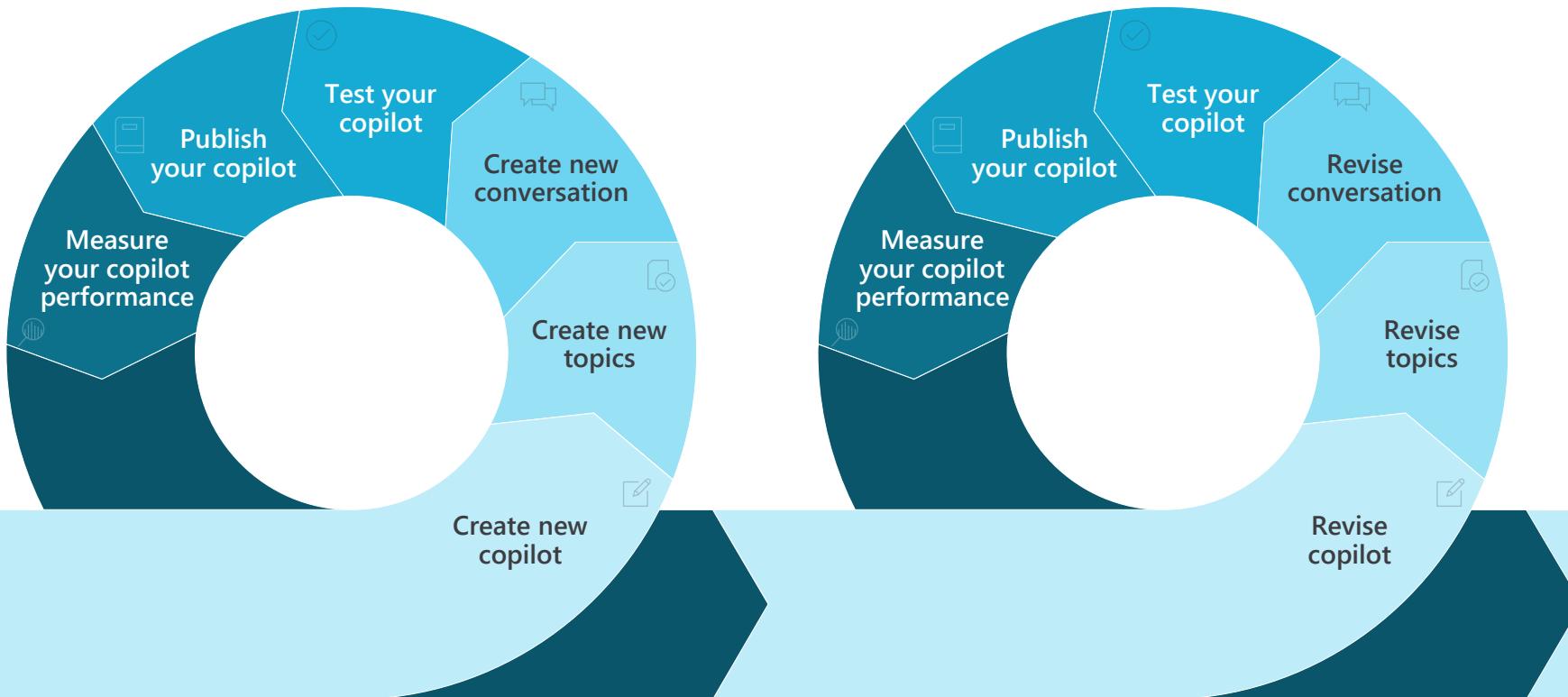
Prebuilt Entities

Custom Entities

Power Automate Flows

Bot Framework Skills

Copilot Creation Process overview

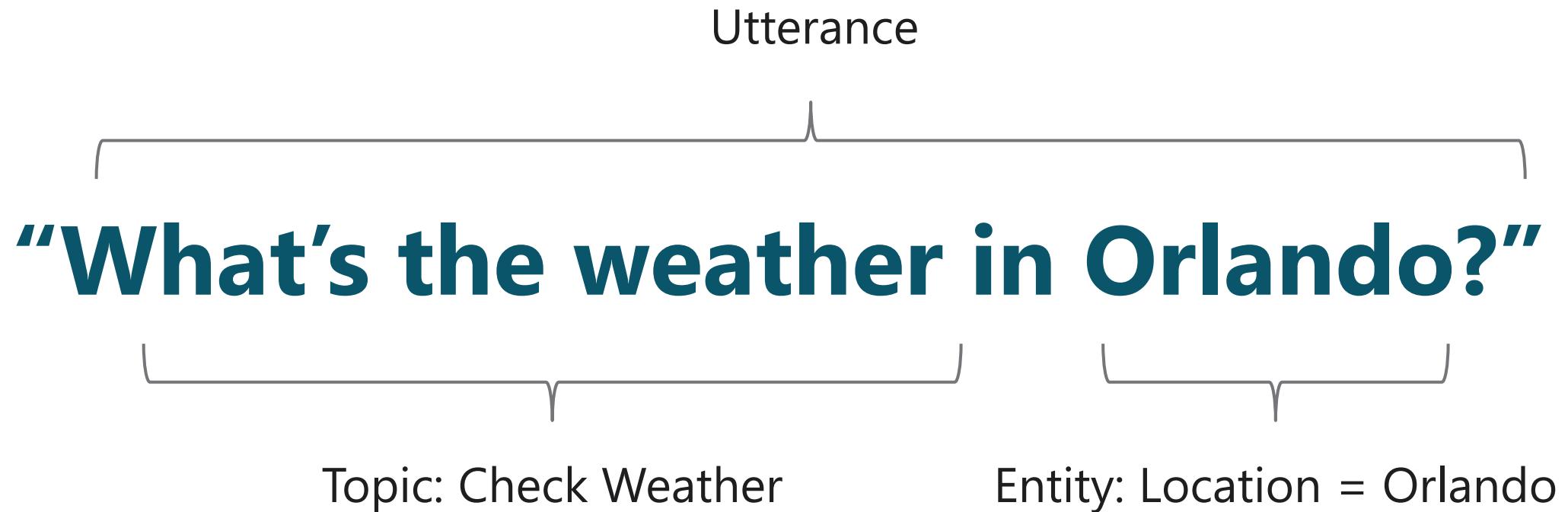


Introduction to Natural Language Understanding

Natural Language Understanding (NLU) is a subfield in Natural Language Processing (NLP).

It focuses on **organizing the user's unstructured inputs** (utterances) so that the copilot can understand and analyze it.

Example in action: topic triggering and slot filling



Create a new preview copilot



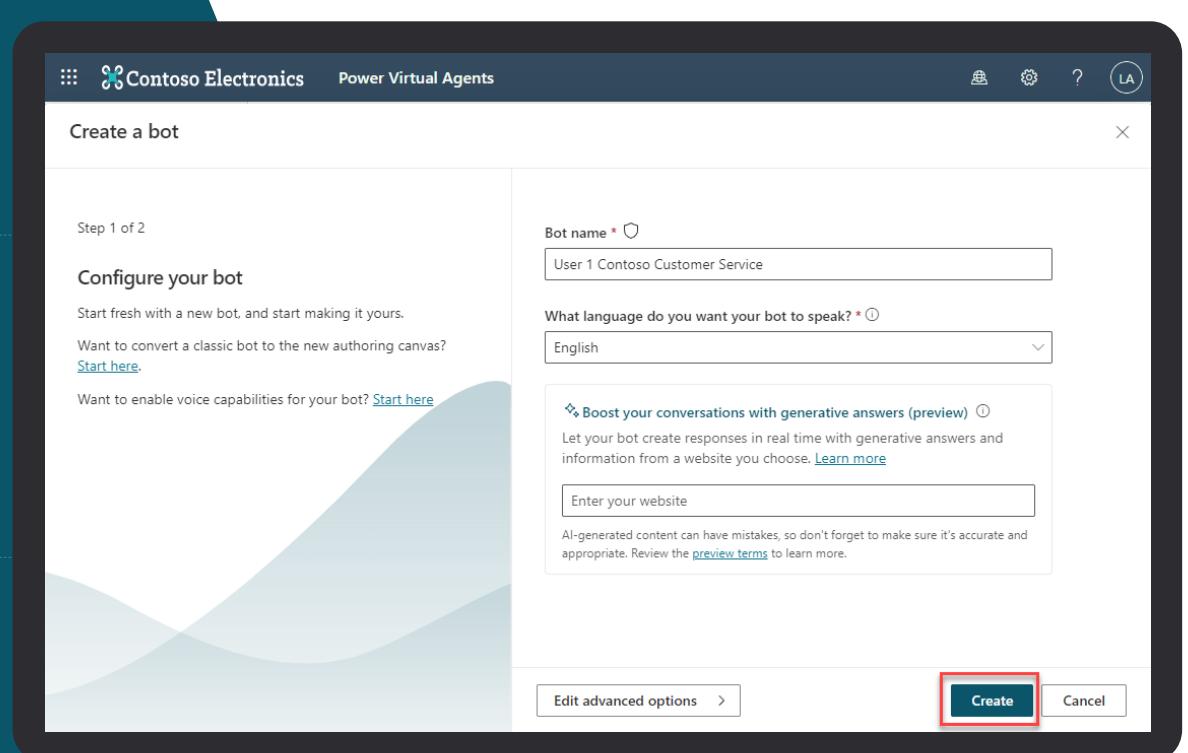
Open the Copilot Studio designer



Copilot Studio



Select 'create copilot'



Supported Languages



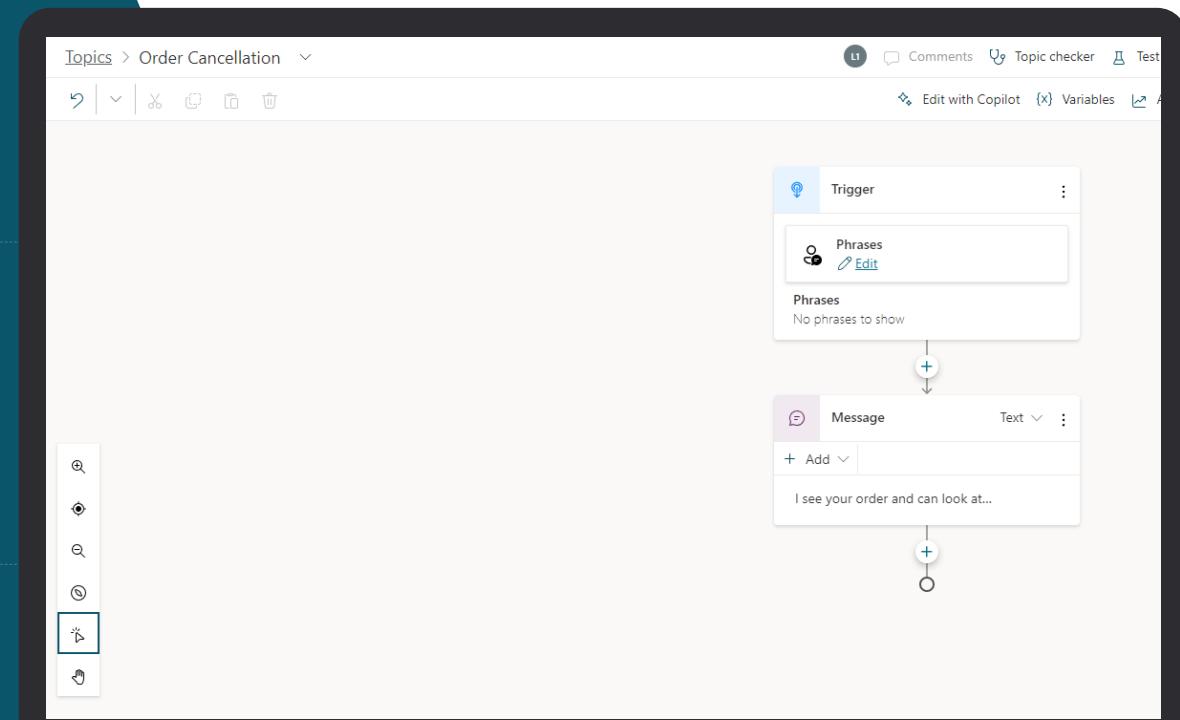
Copilot Studio supports copilots in many different languages



Copilot Studio Unified Authoring Preview is currently available only in English when creating your Copilot



There will be more supported languages throughout Preview



View topics



A copilot comes with 4-7 User topics & 8 system topics



Using one of the 4 topics to get familiar with the structure

The screenshot shows a list of topics in a Microsoft Power Virtual Agents interface. The top navigation bar has tabs for 'Custom (8)' and 'System (8)', with 'Custom' being the active tab. Below the tabs is a header with 'Type', 'Name ↓', and 'Trigger ↑'. The main list contains eight entries, each with a small icon, the topic name, and a 'Phrases' button:

Type	Name ↓	Trigger ↑
Check Order Status	Check Order Status	Phrase
Goodbye	Goodbye	Phrase
Greeting	Greeting	Phrase
Lesson 1 - A simple topic	Lesson 1 - A simple topic	Phrase
Lesson 2 - A simple topic with a condition and variable	Lesson 2 - A simple topic with a condition and variable	Phrase
Lesson 3 - A topic with a condition, variables and a pre...	Lesson 3 - A topic with a condition, variables and a pre...	Phrase
Start Over	Start Over	Phrase
Thank you	Thank you	Phrase

Add conversational trigger phrases



For a topic you'll define a few trigger phrases



A trigger phrase is a way to describe an intent, it captures the way a customer might ask about a problem/issue.
E.g., "problem with weeds in lawn"



You only need to provide at least 5 phrases – the AI will parse whatever the user says and trigger the topic closest in meaning to the user utterance

The screenshot shows the Microsoft Power Virtual Agents interface. At the top, there are various navigation and settings icons. On the left, a sidebar displays a list of topics: 'Customer', 'Customer uses', 'Customer status', 'Order status', and 'Order is due'. In the center, a main panel shows a list of trigger phrases: 'check my order', 'order status', 'order is due', and a plus sign icon. On the right, a modal window titled 'On Recognized Intent' is open under the 'Phrases' section. It contains instructions: 'To start learning, the bot needs 5-10 short trigger phrases.' and 'Show writing tips'. Below this is a red-bordered input field labeled 'Enter text' with placeholder text 'To add phrases in bulk, paste in line-separated phrases or use Shift+Enter to create line separation'. A '+' button is located to the right of the input field. At the bottom of the modal, there is a list of sample phrases: 'please can I check my order', 'check order', and 'confirm order status'.

Open the authoring canvas and begin editing a topic



Open authoring canvas to view the conversation tree



You'll see the trigger phrases at the top. You can edit the conversation tree, adding questions the copilot should ask, things the copilot should say etc.

The screenshot shows the Microsoft Power Virtual Agents interface. At the top, there's a navigation bar with tabs like 'Comments', 'Topic checker', 'Test bot', and a redboxed 'Save' button. Below the navigation is a toolbar with icons for 'Edit with Copilot', 'Variables', 'Analytics', and 'Details'. The main area is titled 'Trigger' and contains a 'Phrases' section with an 'Edit' link. It lists several trigger phrases: 'please can I check my order', 'check order', 'confirm order status', 'update on order status', and 'check when order is due'. There's also a '+ Add' button. To the right, under 'Phrases', it says 'To start learning, the bot needs 5-10 short trigger phrases.' and 'Show writing tips'. A 'Add phrases' input field with a 'Enter text' placeholder and a '+' button is present. Below this, a list of phrases is shown: 'please can I check my order', 'check order', 'confirm order status', 'update on order status', and 'check when order is due'. The entire screenshot is framed by a dark blue border.

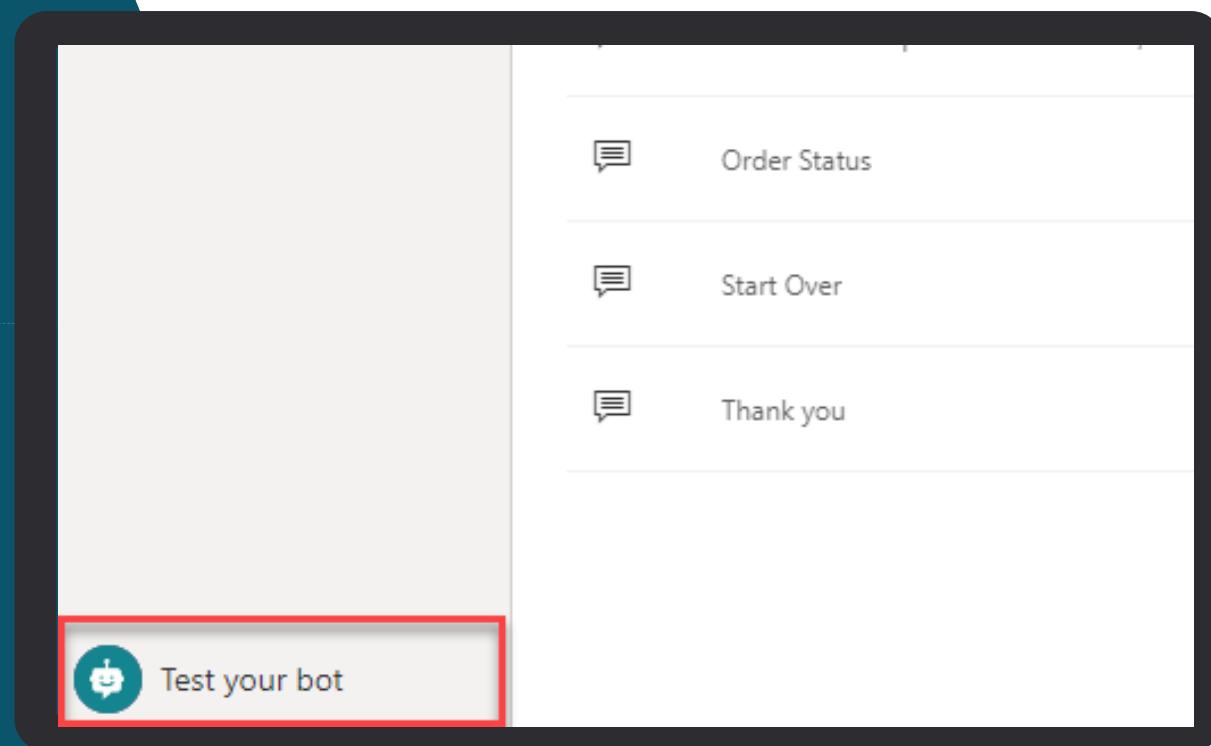
Test your topic as you construct it



To test what you've created click on test copilot (bottom left) to expand test window



Turn on "Track between topics". This lets you trace your way through both this topic and any others you call



Publish to demo website



Publish to demo website and share the URL with colleagues so they can try the copilot



Add screen shot with that publish to demo site show and demo page

A screenshot of a Microsoft Power Platform demo website. The header includes the Microsoft Power Platform logo and a link to "Learn more about Power Virtual Agents". A navigation bar on the right says "User 1 Contoso Customer Service". The main content features a large teal banner with white text: "Try out the chatbot we made!" and "Here are some things my bot can help you with:". Below this are three buttons: "Hello", "Start over", and "Talk to a person". To the right is a chat window showing a message from "User 1 Contoso Customer Service" at "Just now": "Hello, I'm User 1 Contoso Customer Service! Can I help?". There is also a text input field with "Type your message" placeholder text. The bottom right corner of the screenshot has "Legal" and "P" icons.

Enhance your copilot from Analytics

GAIN VISIBILITY OF MANY PARAMETERS



Summary charts



Engagement over time chart



Session outcomes over time chart



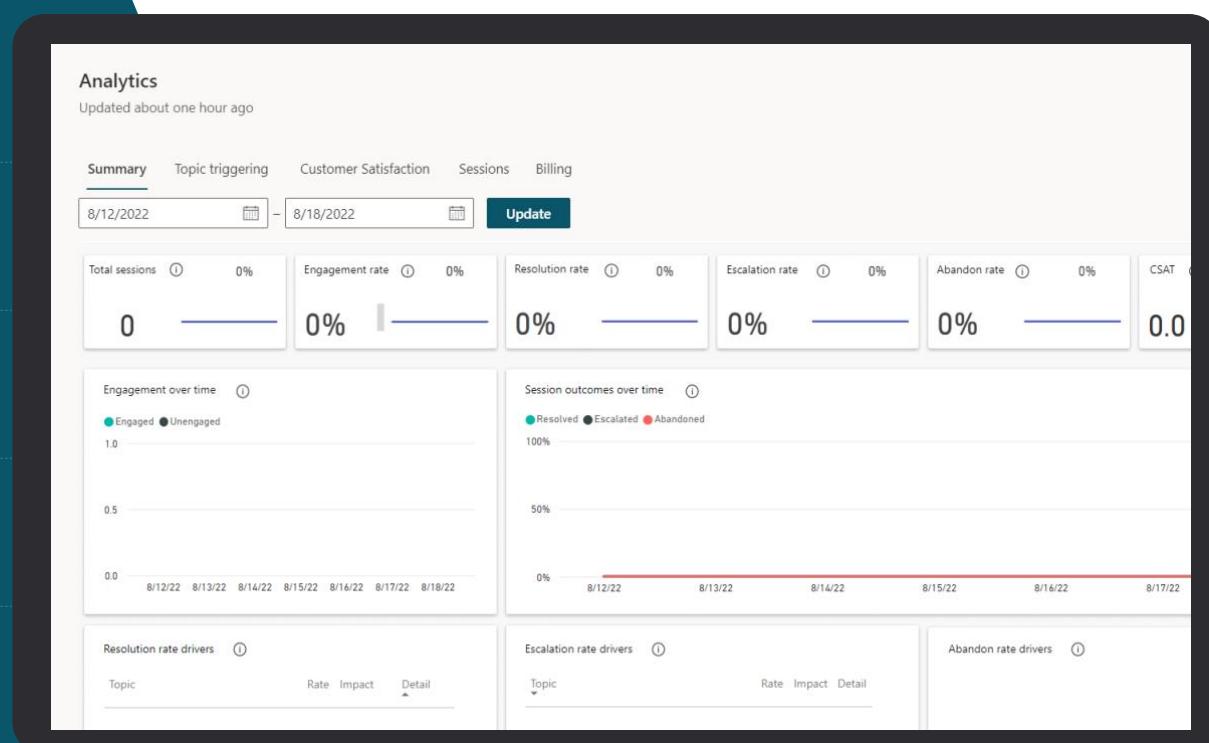
Resolution rate drivers chart



Escalation rate drivers chart



Abandon rate drivers chart



SECTION SUMMARY



Copilot Studio enables users to create a copilot in just minutes

Offers an easy to use designer to help create unique customer copilot experiences

Part of the Microsoft Power Platform

Built on Microsoft Dataverse

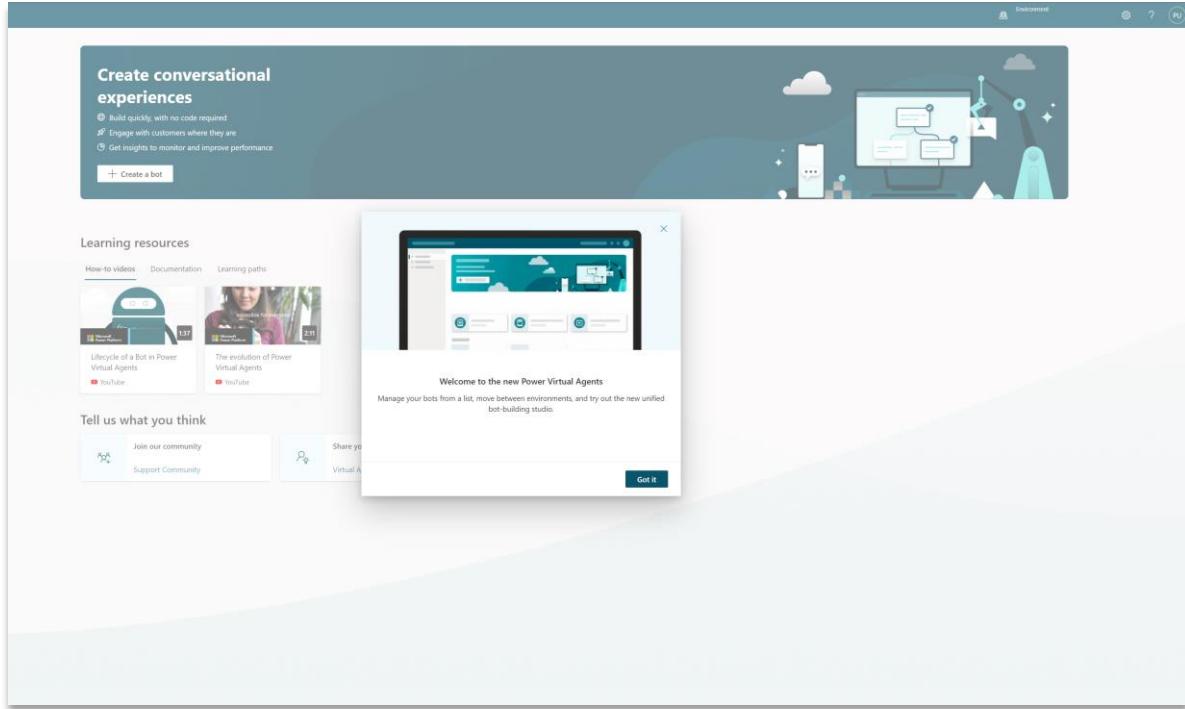


Getting Setup and Access

Setup your Copilot Studio Environment & Log In

Lab 00

-  You should be able to login to your environment using the instructor provided logins
-  You will have a Copilot Studio trial license assigned to you
-  To test you have access to the latest Copilot Studio Preview functionality, navigate to web.powerva.microsoft.com and you should see the following features when you first log in (next slide)



A welcome dialog highlighting the latest version of Copilot Studio

The screenshot shows the Microsoft Power Virtual Agents interface. On the left, there's a sidebar with sections for 'Home', 'Chatbots', and 'Power Platform'. A large 'Create conversational experiences' section is on the right, featuring the same three bullet points as the first screenshot. Below it is a 'Learning resources' section. A 'Create a bot' button is visible in the bottom right corner of the main area, with a red box highlighting it.

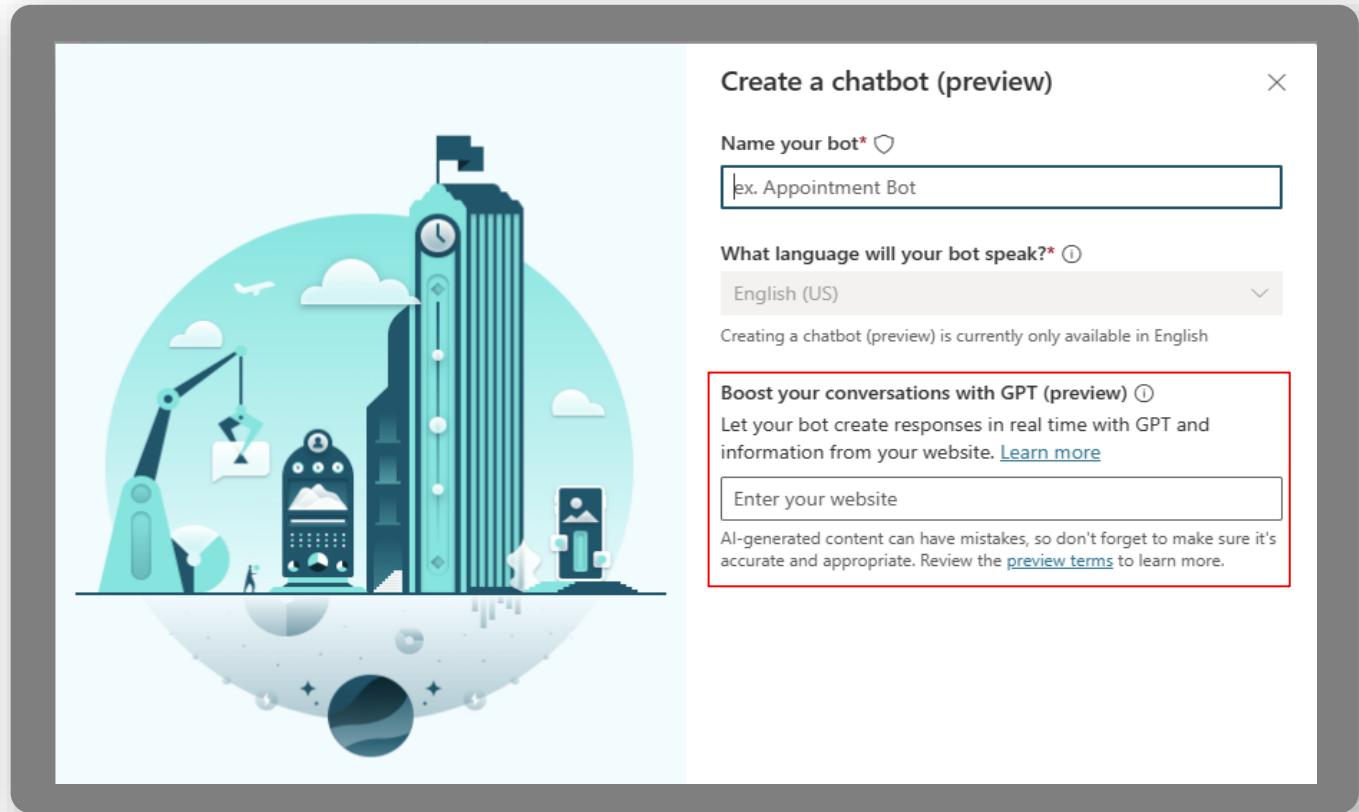
Click 'Create a copilot' and you should be able to start the copilot creation wizard

Planning your first Copilot & Conversational Design

Generative Answers

Public Preview

Make copilots immediately useful by creating responses in real time with GPT without needing to create Topics



- Search web address using Bing and summarize relevant results using GPT
- Dramatically increases the questions that your copilot can answer in seconds without the complexity of creating FAQ or Topics
- Reuse of existing content from your organizations data
- Multiple Sources (Limited Preview)
- Internal Documentation support allowing internal knowledge sources such as SharePoint (Limited Preview)

Try Generative Answers in Copilot Studio



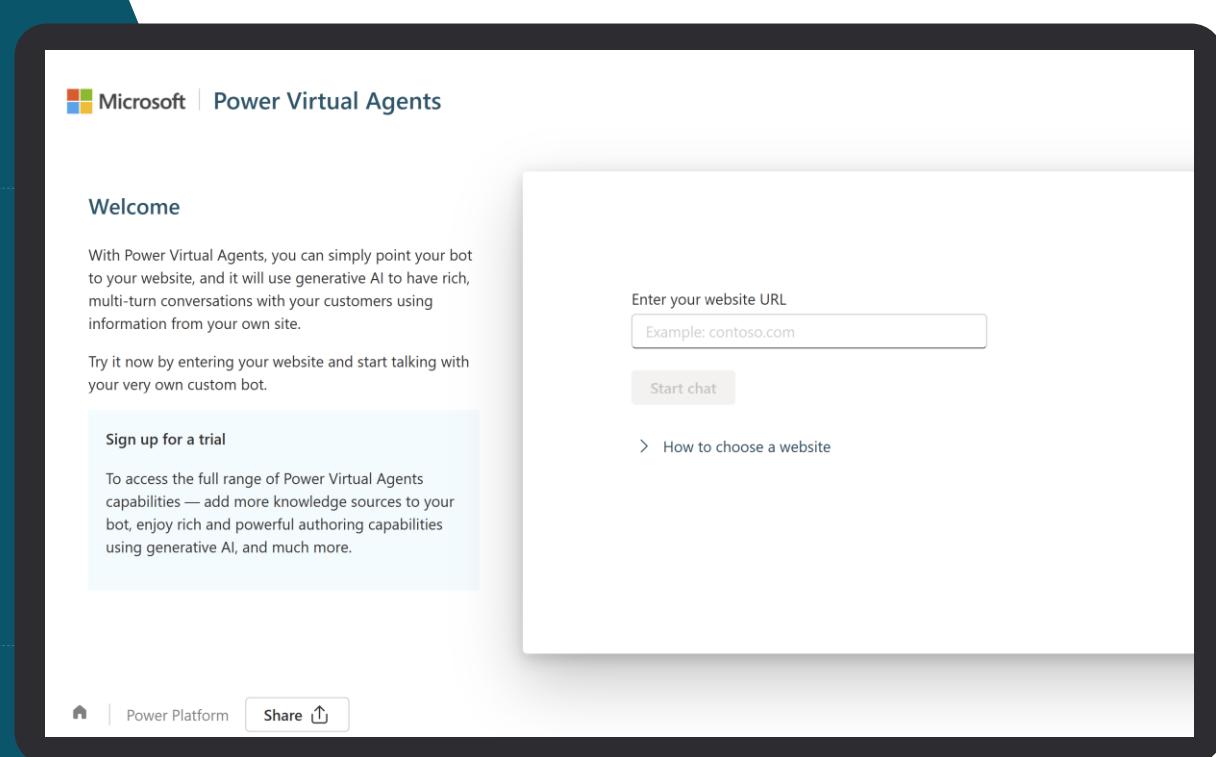
Try one of the latest features in Public Preview – Generative Answers



Open a new tab in your browser and go to the Try It experience as shown on the screen



Add a public facing website and start asking questions!



Planning your first copilot - Ideation



Planning your copilot is essential for the success of your project



Setting goals when implementing any business system should be driven from business value



Take your time planning and do not rush

The screenshot shows the Microsoft Power Virtual Agents interface. At the top, there are navigation links: Comments, Topic checker, Test bot, Save, and more. Below that, a sub-menu bar includes Edit with Copilot, Variables, Analytics, and Details. The main area is titled "On Recognized Intent". On the left, a sidebar lists trigger phrases: "check my order", "order status", "order status", and "order is due". A large red box highlights the "Enter text" input field under the "Add phrases" section. To the right, a list of recognized phrases is shown: "please can I check my order", "check order", and "confirm order status".

Planning your first copilot – Requirements Gathering



Topic Planning is essential to be able to map the range of topics you want to enable for your users



Use the template provided in the Bot Building Handbook to log key information about the topics



Additional information can be added and developed as you go

The screenshot shows an Excel spreadsheet titled "PVA_Req_Template - Saved". The spreadsheet has a green header row with various columns for requirements management. The columns include:

Column1	Use Case Statement/Question	Topic Name	Sub-Topic Name	MVP	Phase 2	Type (Single turn vs Multi)	Channel (Web, Apple, chat, whatsa)	Adaptive (Cards, rich, content/ forms)	Dynamic (List (eg. Showing Purchas e actions), history) <5 secs	BF Skill	
BP-001	"How much do I owe for my service?"	Payment Balance	Balance inquiry	X					Y	Y	A-001
BP-002	"I need to pay an invoice"	Make a payment	Make a payment (CC or ACH)		X	X			Y	Y	
BP-003	"Can I prepay for my order?"	Make a payment	Prepayment (CC or ACH)	X	X				Y	Y	
BP-004	"Can I setup automated payments?"	Make a payment	Enroll in Auto Pay	X	X				Y	Y	
BP-005	"can I pay my bill with the card on file that ends with 4444?"	Make a payment	Pay or Prepay with payment method on file	X	X					Y	
BP-006	"what is my payment history?"	Payment history	Payment History		X				Y	Y	
Orders and Shipping											

What makes a copilot successful?



Knowing your customer



Having accurate,
latest and
effective content



Knowing when
to hand off to a
human



Understanding
the customer's
request and
connecting it to
the right topic



Providing
personalized,
context-aware
help, and taking
actions for the
customer

Types of conversation topics

People use your copilot with a specific issue ("topic") to address or resolve. You can loosely categorize topics into 3 types:



Informational

What is...? When will...? Why...?



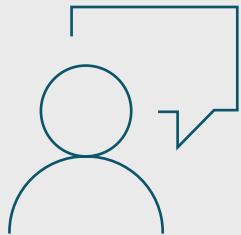
Task completion

I want to... How do I...?

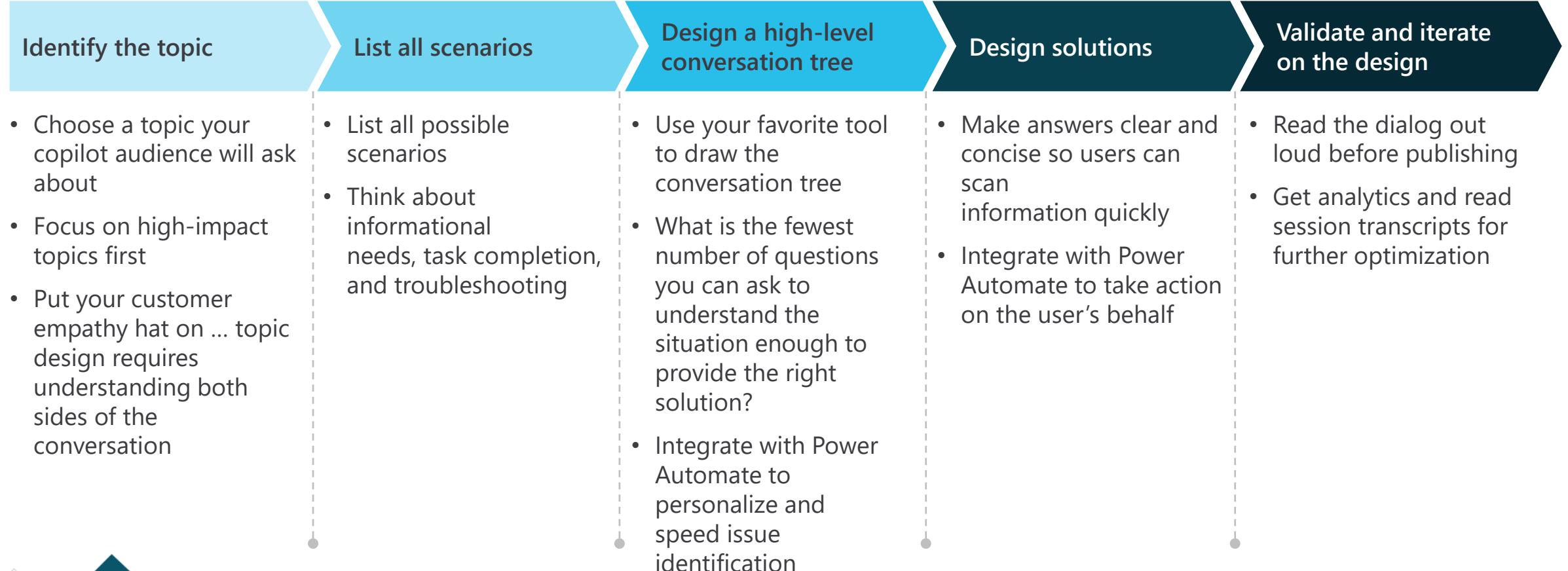


Troubleshooting

Something isn't working right. I got an error message



Designing a topic



Copilot conversation styles

Qualities of a good conversation

Cooperative



Goal-oriented



Fast



Turn-based



Truthful



Polite



Style: How to sound conversational 1/9

Customer conversations should emulate the best elements of any conversation — personal and polite, friendly and supportive

A few stylistic changes in writing can impart warmth and familiarity to your brand voice

Don't overuse exclamation points to convey energy. It's easy to rely on them for this purpose, but too many, in the wrong places, could be interpreted as insincere and robotic

The image shows a digital conversation interface. On the left, there is a dark teal sidebar with white text. On the right, there is a white main area with a dark blue header bar at the top. The main area contains a conversation between a bot (represented by a blue circular icon with a white person symbol) and a user (represented by a grey circular icon with a white person symbol). The user has a small profile picture of a man in the bottom right corner of their message bubble. The messages are as follows:

- User: Hey Bryan! Would you like the usual — a large cheese pizza?
- Bot: So you know, there is a buy-a-large-get-a-small-free deal going on through Saturday. Do you want to try this deal?
- User: Yeah!!
- Bot: Great! Let me get your order started for you.

Style: How to sound conversational 2/9



Use short sentences



Sounds great! Let me get that started for you.



Be positive



Let's get started. I have a couple questions. Should only take a minute.



Use active voice



No problem. I can resolve this for you.

Style: How to sound conversational 3/9



I'm going to ask you a couple questions.
It should only take a minute.



Good choice. I have a couple suggestions
based on what you've selected.

Great.



Use contractions: "I'm" instead of "I am."

**Select a pronoun to represent your brand agent
in chat and be consistent: "I" or "we."**

Style: How to sound conversational 4/9

Be consistent with tone and style so the conversation sounds like it's with the same agent and brand



Do



Hi there. Welcome to the Store Assistant. I can help you make a return or exchange.



Let me know at any time if you'd like to chat with a live customer service agent.

I want to return an item



OK. Could you provide your order number, please?



Don't



Hi there. Welcome to the Store Assistant. I can help you make a return or exchange.



If you wish to be in contact with a live customer service agent in regards to your problem, please click the button below.

Tone shifts to formal

I want to return an item



OK. Provide your order number.

Demanding tone

Style: How to sound conversational 5/9

If you're using website documentation to answer a question, break sections down into short, scannable graphs



Do



How to reset your password:

1. Go to <https://account.live.com/password/reset>.
2. Select the reason for resetting your password and the alternate contact info where you can receive a security code to verify your identity.

Note: This alternate contact info is part of the security info you already added to your Microsoft account.



Don't



How to reset your Password
If you cannot remember your password, go to <https://account.live.com/password/reset> and select the reason for resetting your password. Then include the alternate contact info where you can receive a security code to verify your identity. Note: This alternate contact info is part of the security info you already added to your Microsoft account.

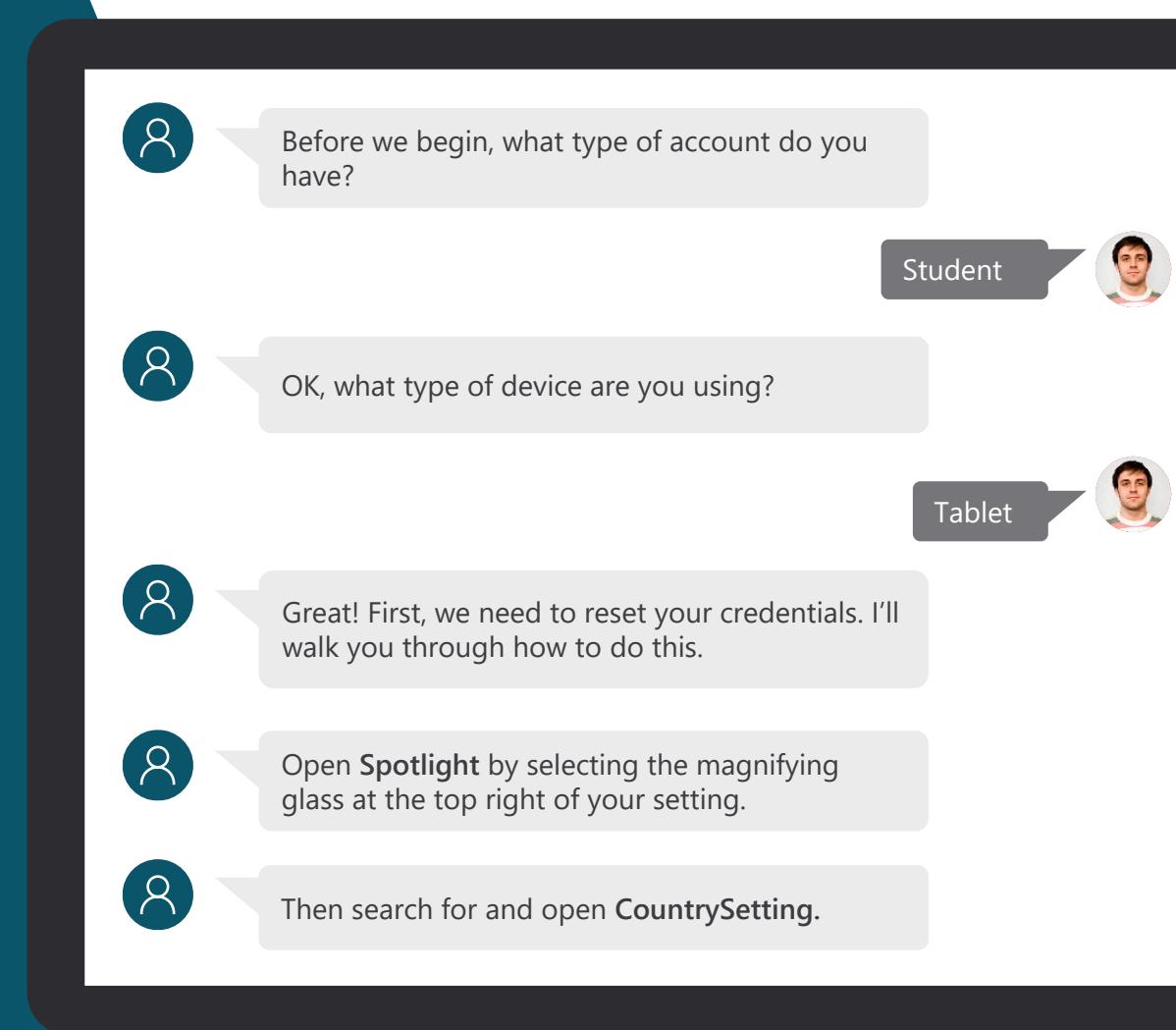
Style: How to sound conversational 6/9

Pace the conversation in short, scannable units

Break up messages into separate, readable blocks to make the pace of the conversation feel more natural

Make sure the copilot doesn't respond so quickly that it rushes the customer. Add a minimum delay if necessary

Check in to make sure the user is following the conversation after explaining or answering a question, particularly a complex one

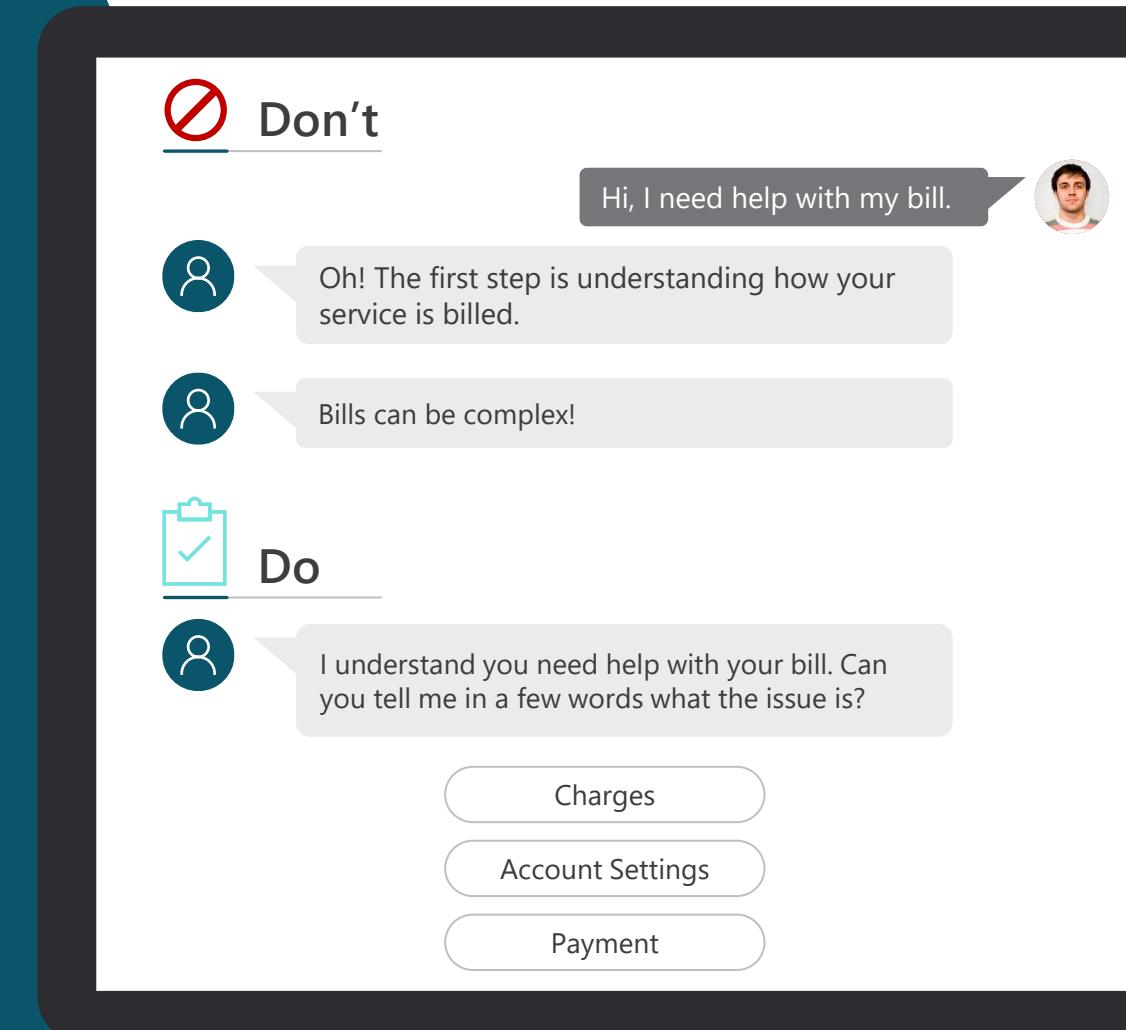


Style: How to sound conversational 7/9

Maintain a friendly tone when helping to complete the task

Tailor the tone of the copilot's responses to the context. If it's something serious—like billing or cybersecurity—be empathetic but brief and straightforward. If it's a more mundane situation (like creating a new account), the tone can be more relaxed.

Exclamation points don't express energy or excitement. Strong writing does, particularly strong verbs. In your desire to help, avoid sounding condescending or insincerely enthusiastic.

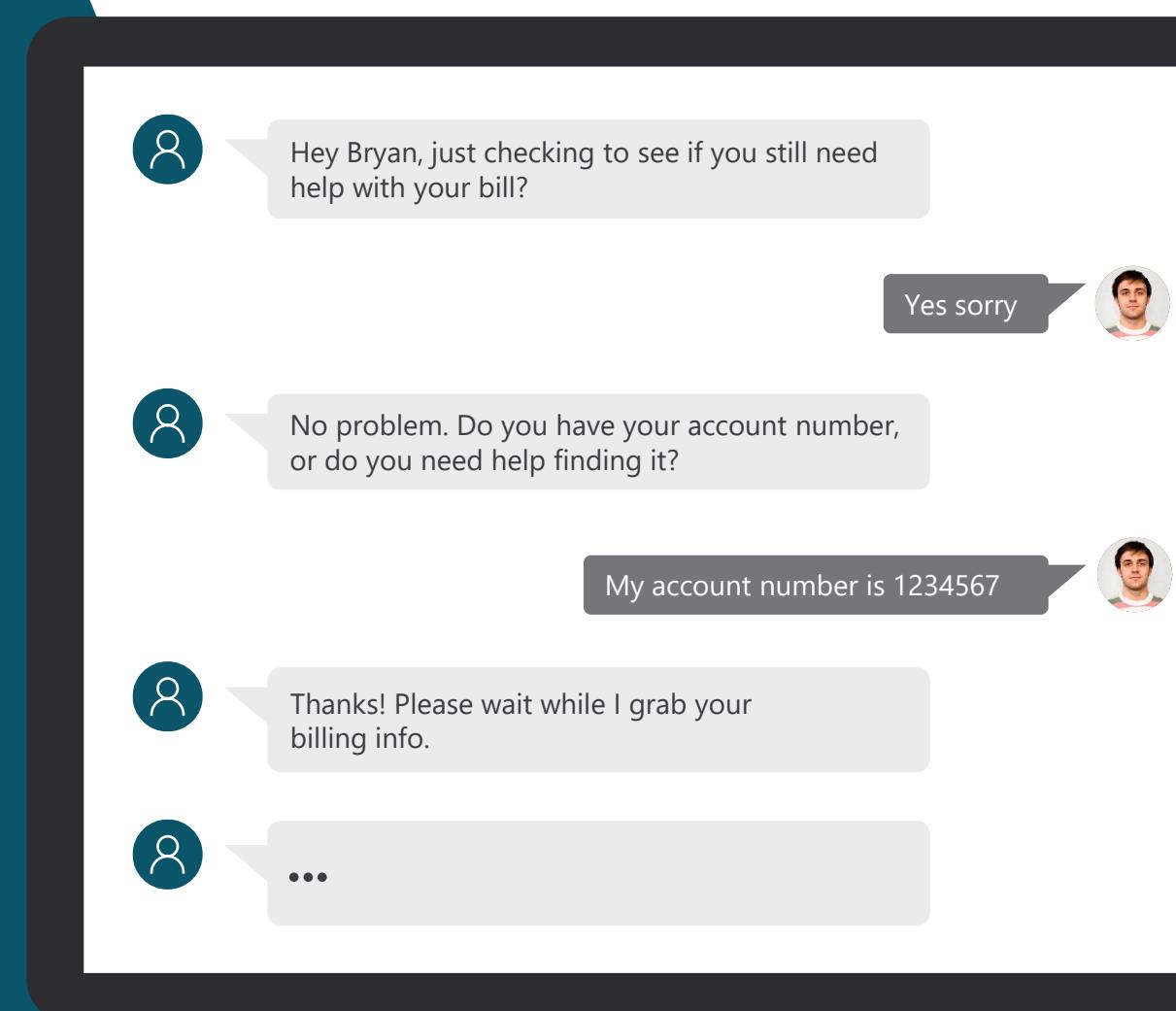


Style: How to sound conversational 8/9

Invite the user into the conversation on a regular basis by asking questions or making suggestions.

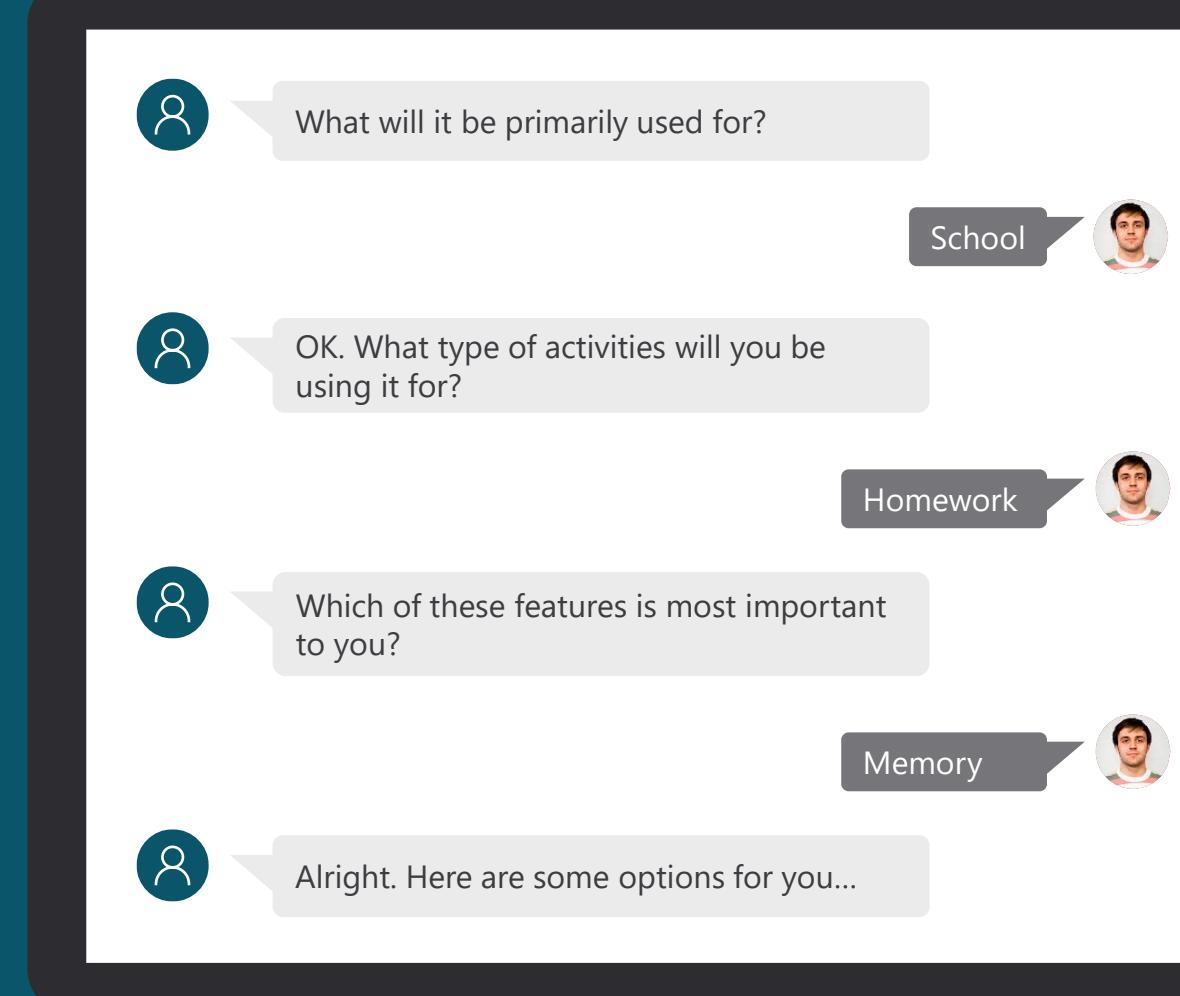
Respond to the customer in a timely manner.

If the copilot may take a while to process the customer's request, let the customer know what to expect.



Style: How to sound conversational 9/9

Customers abandon a chat when the prompts are lengthy, so keep them brief. To keep your writing simple and straightforward, use the Flesch-Kincaid Grade Level feature in Microsoft Word or an app like Hemingwayapp.com to figure out the grade level for your scripts. In general, the lower the grade level, the better.



Planning your first copilot - Ideation



Planning your copilot is essential for the success of your project



Setting goals when implementing any business system should be driven from business value



Take your time planning and do not rush

The screenshot shows the Microsoft Power Virtual Agents interface. A modal window titled "On Recognized Intent" is open. At the top right of the modal are buttons for "Comments", "Topic checker", "Test bot", "Save", and "Details". Below these are links for "Edit with Copilot", "Variables", "Analytics", and "Details". The main area of the modal is titled "Phrases" and contains the text: "To start learning, the bot needs 5-10 short trigger phrases." Below this is a "Show writing tips" link. A red box highlights the "Add phrases" input field, which contains the placeholder "Enter text". Below the input field is a note: "To add phrases in bulk, paste in line-separated phrases or use Shift+Enter to create line separation". A list of existing phrases is shown: "please can I check my order", "check order", and "confirm order status".

Planning your first copilot – Requirements Gathering



Topic Planning is essential to be able to map the range of topics you want to enable for your users



Use the template provided in the Bot Building Handbook to log key information about the topics



Additional information can be added and developed as you go

The screenshot shows an Excel spreadsheet titled "PVA_Req_Template - Saved". The spreadsheet has a green header row with various columns for requirements management. The columns include:

Column1	Use Case Statement/Question	Topic Name	Sub-Topic Name	MVP	Phase 2	Type (Single turn vs Multi)	Channel (Web, Apple, chat, whatsa)	Adaptive (Cards, rich content/ forms)	Dynamic (List (eg. Showing Purchas e history), Latency <5 secs)	BF Skill
BP-001	"How much do I owe for my service?"	Payment Balance	Balance inquiry	X						A-001
BP-002	"I need to pay an invoice"	Make a payment	Make a payment (CC or ACH)		X	X				
BP-003	"Can I prepay for my order?"	Make a payment	Prepayment (CC or ACH)	X	X					
BP-004	"Can I setup automated payments?"	Make a payment	Enroll in Auto Pay	X	X					
BP-005	"can I pay my bill with the card on file that ends with 4444?"	Make a payment	Pay or Prepay with payment method on file	X	X					
BP-006	"what is my payment history?"	Payment history	Payment History		X					
Orders and Shipping										
10										
11										
12										
13										
14										
15										

Creating your first copilot

Creating your first copilot



Take the time to familiarize yourself with the User Interface



Don't try to do everything at once. Lab 01 keeps things simple with creating a topic, testing and publishing



Even if you finish the lab quickly, try repeating the same steps to become familiar with core actions

The screenshot shows a dark-themed user interface. On the left, there's a sidebar with a menu bar at the top containing 'Home', 'Chatbots', and 'Power Platform'. Below the menu bar, there's a large, semi-transparent dark overlay. In the center of this overlay, the text 'Create conversational experiences' is displayed in white. Below this text are three bullet points: 'Build quickly, with no code required', 'Engage with customers where they are', and 'Get insights to monitor and improve performance'. At the bottom of the overlay, there's a white button with a red border and a plus sign, labeled '+ Create a bot'.

Learning resources



Home

Create

Chatbots

Create conversational experiences

- Build quickly, with no code required
- Engage with customers where they are
- Get insights to monitor and improve performance

[+ Create a bot](#)

Learning resources

[How-to videos](#) [Documentation](#) [Learning paths](#)

Lifecycle of a Bot in Power Virtual Agents

[YouTube](#)

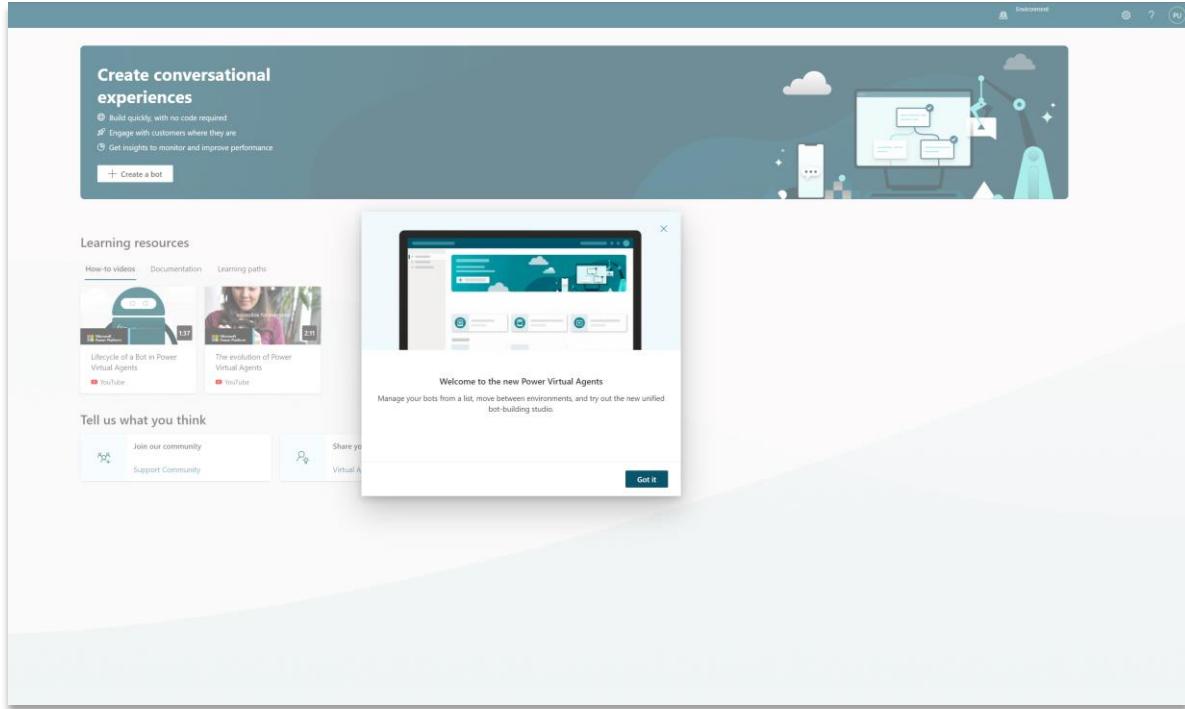
The evolution of Power Virtual Agents

[YouTube](#)

Tell us what you think

[Join our community](#)[Support Community](#)[Share your thoughts and ideas](#)[Virtual Agent Idea Forum](#)[Get hands-on with bot building](#)[Power Virtual Agents in a Day](#)

The 'Home' page



A welcome dialog highlighting the latest version of Copilot Studio

The screenshot shows the Microsoft Power Virtual Agents interface. On the left, there's a sidebar with 'Home', 'Chatbots', and 'Power Platform' options. The 'Home' option is selected. On the right, there's a dark blue panel with the heading 'Create conversational experiences' and three bullet points: 'Build quickly, with no code required', 'Engage with customers where they are', and 'Get insights to monitor and improve performance'. Below this is a 'Create a bot' button, which is highlighted with a red border. The background shows a stylized illustration of a robot and clouds.

Click 'Create a copilot' and you should be able to start the copilot creation wizard

User 1 Contoso Customer Service

[View Solution \(Default Solution\)](#) ⓘ

- A
- B
- C
- D
- E
- F



≡

Chatbots

Overview

Topics

Entities

Analytics

Publish

Settings

Test bot

Track between topics ⓘ

...

Chat

Hello, I'm User 1 Contoso Customer Service.
How can I help?

5 minutes ago

User 1 Contoso Customer Service

[View Solution \(Default Solution\) ⓘ](#)



Create generative answers (preview)

Boost your conversations in real time based on selected content to answer unanticipated questions. [Learn more](#)

[Get started in AI Capabilities](#)



Edit and test your bot

Customize topics to fit your bot to see the conversation in

[Test bot](#)

Learn more

[Power Virtual Agents documentation](#)

Product videos

[Building bots better together](#)

Tell us what you think

The screenshot shows the Microsoft Power Virtual Agents interface for managing topics. The left sidebar includes options like Chatbots, Overview, Topics (selected), Entities, Analytics, Publish, and Settings. The main area displays a topic titled "Check Order Status".

UI Elements labeled A through H:

- A:** Topic title "Check Order Status" with a dropdown arrow.
- B:** Action bar icons: back, forward, search, refresh, and delete.
- C:** Top right action bar: Comments, Topic checker, Test bot, Save, and more.
- D:** Top right action bar: Edit with Copilot, Variables, Analytics, and Details.
- E:** Topic details panel title "Topic details".
- F:** Trigger configuration panel title "Trigger".
- G:** Trigger configuration panel "Phrases" section.
- H:** Bottom left toolbar icons: magnifying glass, target, search, refresh, and a highlighted hand icon.

Topic details:

- Name: **Check Order Status**
- Description: Enter a description
- Status: On
- Created: Lab Admin 1, 5/25/2023, 1:52 PM
- Modified: Lab Admin 1, 5/25/2023, 1:52 PM

Trigger Phrases:

- please can I check my order
- check order
- confirm order status
- update on order status
- check when order is due

Bottom left toolbar:

- Test your bot icon

Best practices for writing topic trigger phrases

Trigger phrases – Definition

Trigger the copilot to begin a conversation about a specific topic

The screenshot shows the Microsoft Bot Framework Composer interface. At the top, there are navigation links: L1, Comments, Topic checker, Test bot, Save, and more. Below the header, there are buttons for Edit with Copilot, Variables, Analytics, and Details.

The main area displays a "Trigger" card. The card has a blue header with a microphone icon and the word "Trigger". Below the header is a "Phrases" section with an "Edit" button. The "Phrases" list contains the following text:

- please can I check my order
- check order
- confirm order status
- update on order status
- check when order is due

At the bottom of the trigger card is a circular connector node with a plus sign (+) inside it, indicating where to connect other components.

To the right of the trigger card is a sidebar titled "On Recognized Intent". This sidebar includes a "Phrases" section with instructions: "To start learning, the bot needs 5-10 short trigger phrases." It also features a "Show writing tips" link and a "Add phrases" section with a red-bordered input field labeled "Enter text" and a plus sign (+) button.

The "Add phrases" section lists three phrases:

- please can I check my order
- check order
- confirm order status

Guidelines for better trigger phrase design



Clearly understand the goal
and scope of the topic



Start with 5 to 10
trigger phrases



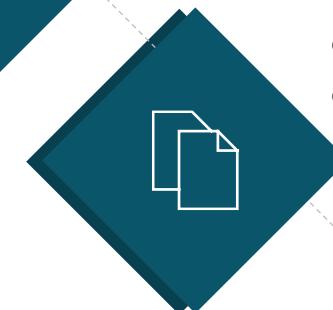
Shorter trigger phrases
with fewer than 10 words
are generally better



Make sure the trigger phrases
are semantically different

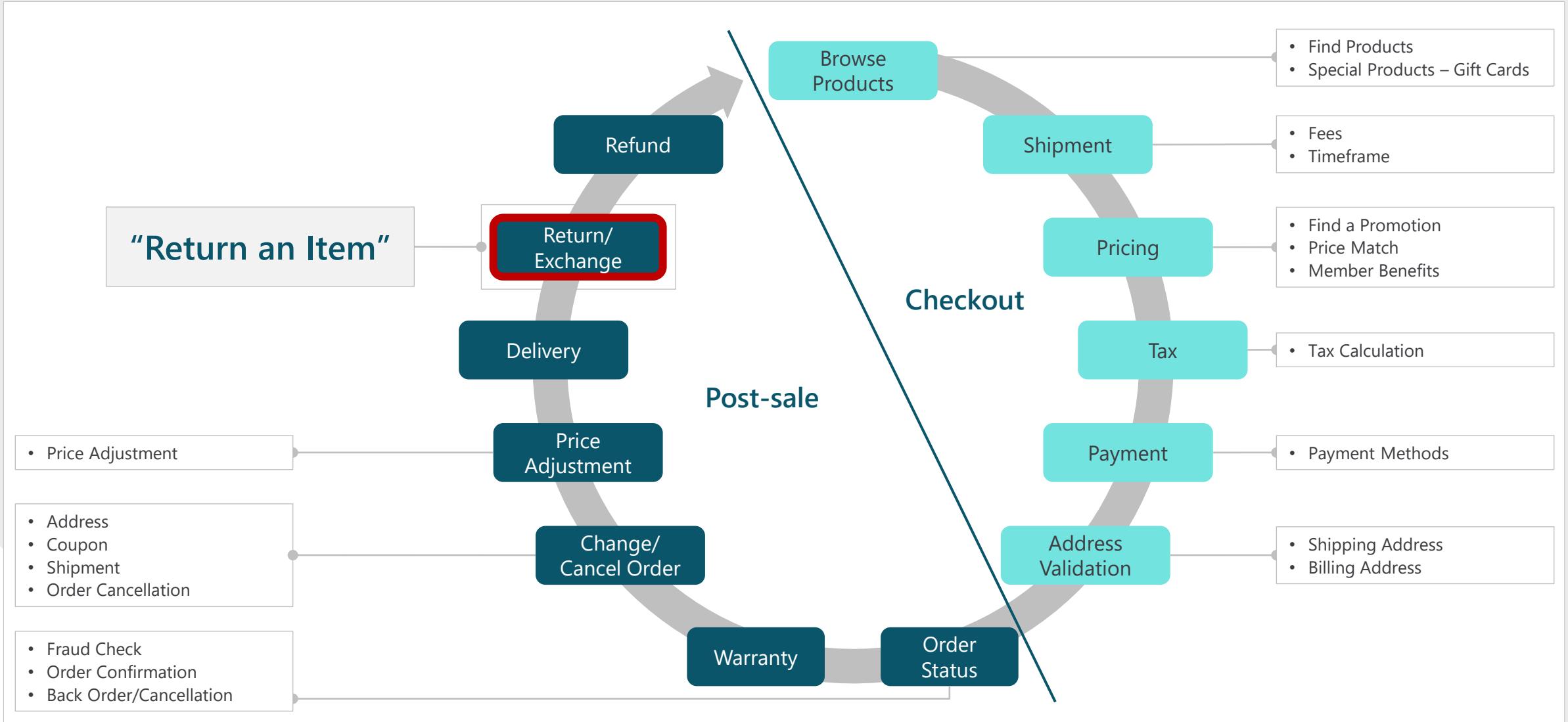


Use the words your
customers use!



Avoid trigger phrases that
are highly ambiguous
among different topics

Step 1: Pick a topic



Step 2: Define the goal for the topic

The screenshot shows a software interface for defining a topic. On the left, there's a sidebar with 'Return an item' selected under 'Setup'. Below it, there are two main sections: 'Name *' and 'Description'. The 'Name *' section contains the text 'Return an item'. The 'Description' section contains a numbered list: 1. Describe the return policy, 2. Check the customer's eligibility for return, and 3. Process the return. To the right of the 'Name' section is a callout box labeled 'Topic: "Return an item"'. To the right of the 'Description' section is a callout box labeled 'Goal:' followed by the same numbered list.

Return an item

Setup Analytics

Name *

Return an item

Description

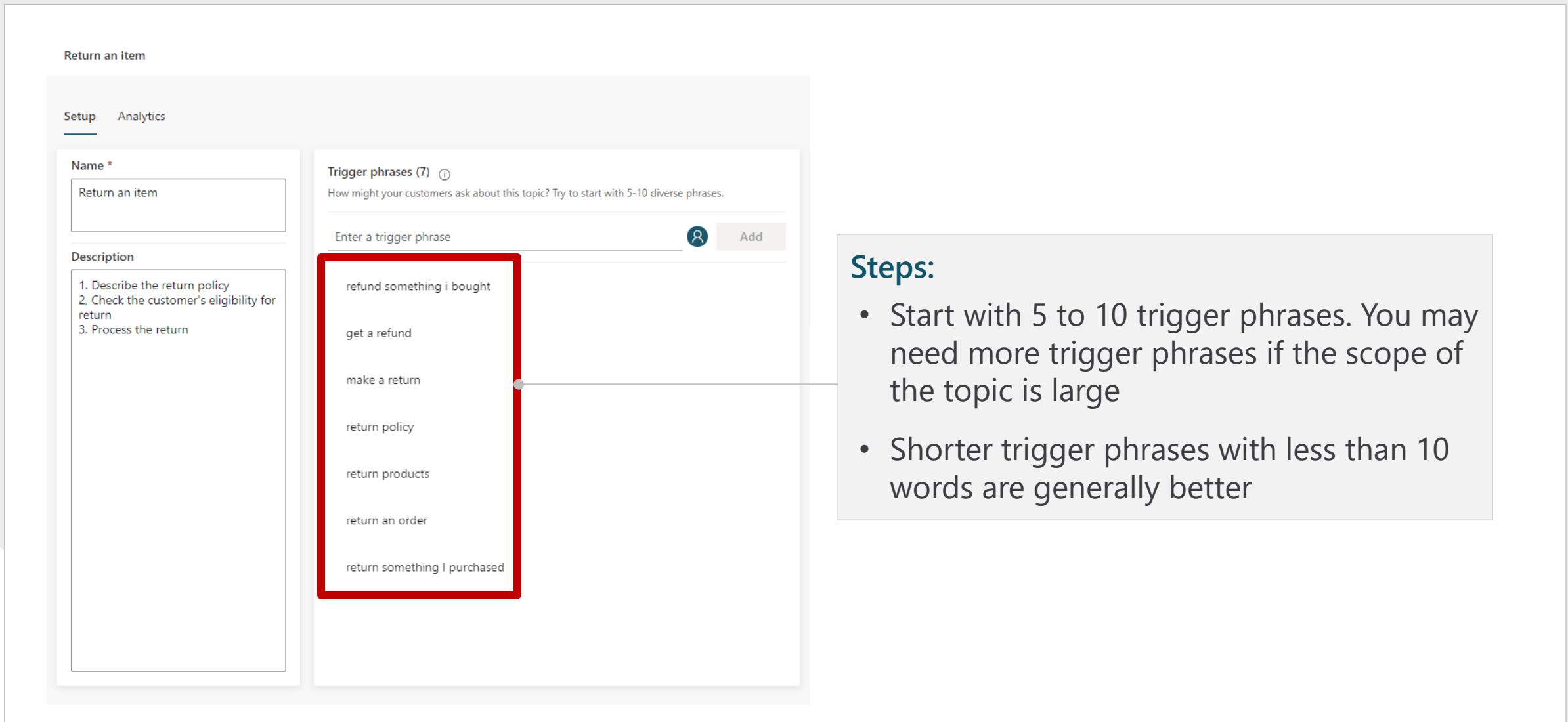
1. Describe the return policy
2. Check the customer's eligibility for return
3. Process the return

Topic: "Return an item"

Goal:

1. Describe return policy of the store
2. Check customer's eligibility for return
3. Process the return

Step 3: Create trigger phrases



Return an item

Setup Analytics

Name *

Return an item

Description

1. Describe the return policy
2. Check the customer's eligibility for return
3. Process the return

Trigger phrases (7) ⓘ
How might your customers ask about this topic? Try to start with 5-10 diverse phrases.

Enter a trigger phrase Add

refund something i bought
get a refund
make a return
return policy
return products
return an order
return something I purchased

Steps:

- Start with 5 to 10 trigger phrases. You may need more trigger phrases if the scope of the topic is large
- Shorter trigger phrases with less than 10 words are generally better

Step 4: Review trigger phrases 1/3

Refund something I bought

Get a refund

Make a return

Return policy

Return products

Return an order

Return something I purchased

Steps:

- Make sure the trigger phrases are semantically different; using one different noun or verb could be enough to expand a topic's coverage

Step 4: Review trigger phrases 2/3



- Adding articles (an, the, etc.), capitalization, contractions, and pluralization has a low chance of improving the triggering

Step 4: Review trigger phrases 3/3

The image shows two screenshots of a customer service platform's 'Setup' interface for different topics.

Top Topic: Return an item

- Name:** Return an item
- Description:** 1. Describe the return policy
2. Check the customer's eligibility for
- Trigger phrases (8):** How might your customers ask about this topic? Try to start with 5-10 diverse phrases.
 - cancel and get a refund

Bottom Topic: Cancel an order

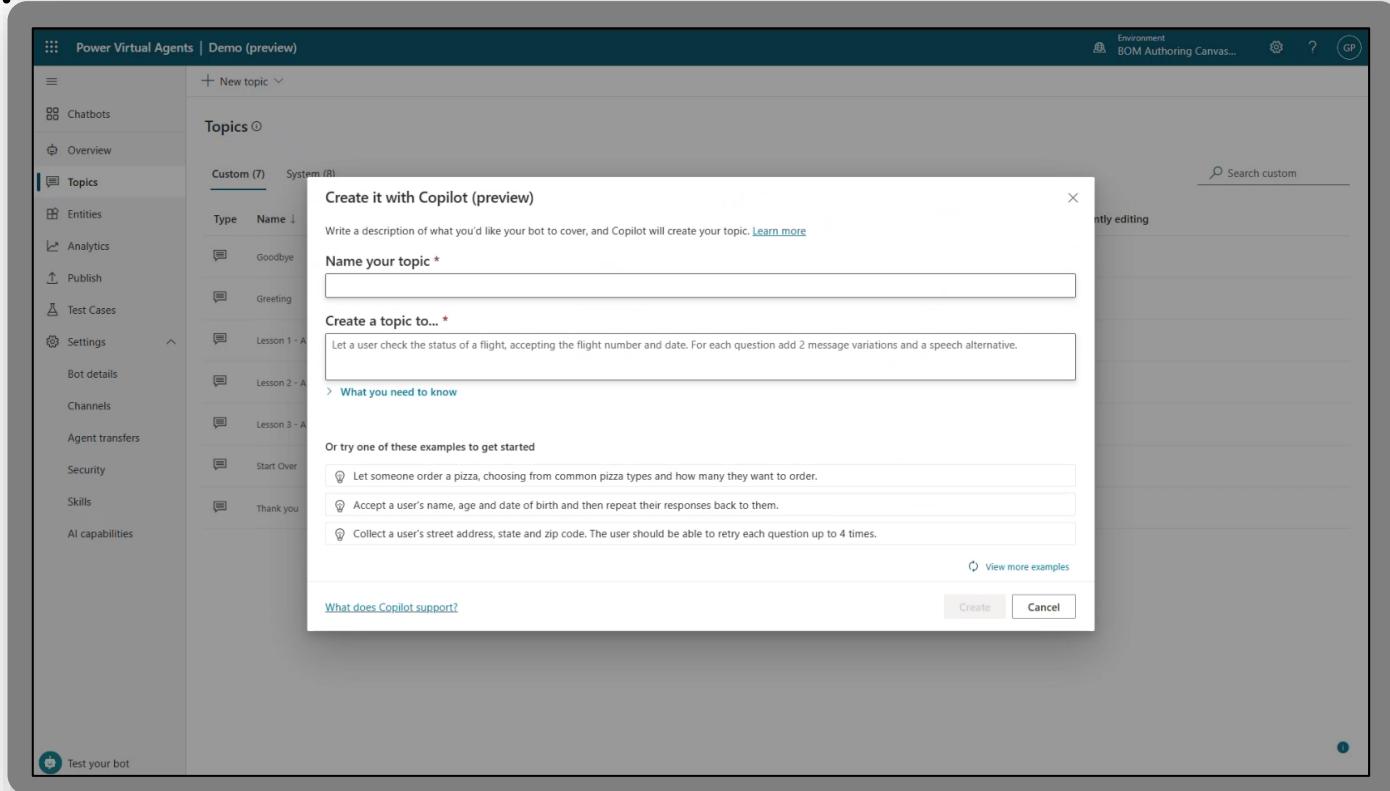
- Name:** Cancel an order
- Description:** Walks customer through canceling an order
- Trigger phrases (3):** How might your customers ask about this topic? Try to start with 5-10 diverse phrases.
 - stop a transaction
 - cancel my shipment
 - cancel order

A large red 'no' symbol is overlaid on the bottom topic's trigger phrase list, indicating a problem. A red line connects the 'cancel and get a refund' phrase in the top topic to the 'cancel order' phrase in the bottom topic, highlighting the overlap.

- Avoid overlapping trigger phrases or ambiguous trigger phrases among different topics

Generative AI

AI assistance in building topics, designing and modifying the copilot all through natural language.



Assisted authoring for:

- Topic creation
- Topic iteration
- Response generation
- Adaptive Card generation
- Topic improvement suggestions
- Suggested trigger phrases, topic names, topic descriptions
- Transcript generation
- Copilot creation
- Topic suggestions

Azure copilots take months to author.

Copilots took days to author.

Prompt-authored solutions will take hours, or even minutes to author.

Creating a Topic with Co-Pilot

Create topics using Natural Language to describe what you need the topic to do



Reduce manual steps of creation and iterate using Co-Pilot too!

The screenshot shows the Microsoft Power Virtual Agents interface. At the top, there's a navigation bar with a search icon, a three-dot menu, and a refresh icon. Below it is a modal window titled '+ New topic'. The 'Create with Copilot' option is highlighted with a red box. The main area lists existing topics: 'Check Order Status', 'Goodbye', 'Greeting', 'Lesson 1 - A simple topic', 'Lesson 2 - A simple topic with a condition and variable', and 'Lesson 3 - A topic with a condition, variables and a pre...'. Below this is a section titled 'Create it with Copilot' with a sub-section 'Name your topic *' containing the value 'Order Status'. Another section 'Create a topic to... *' contains the description 'Create a topic that provides the status of an order for a customer, asking them their name, order number and when it was ordered.' At the bottom, there are buttons for 'View more examples', 'Create' (which is also highlighted with a red box), and 'Cancel'.

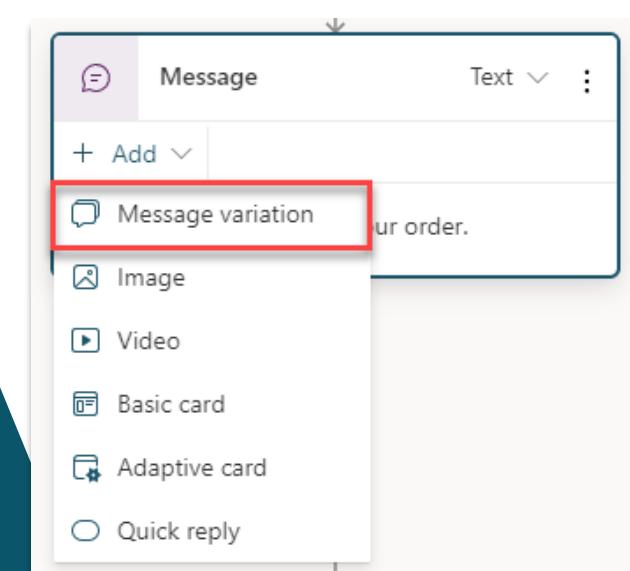
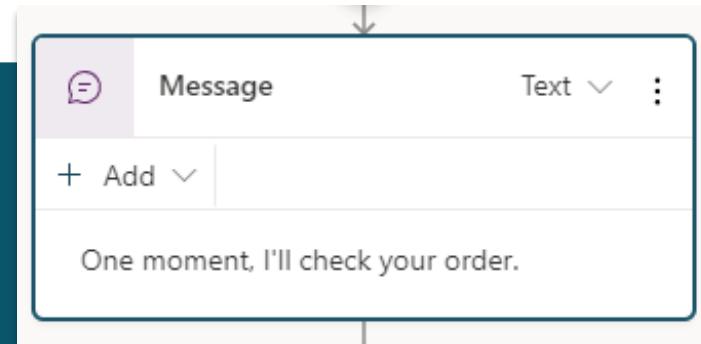
Authoring 101 in the Unified Authoring Canvas

The Message Node

The Message Node is one of the most common nodes used when authoring copilots



It allows you to display standard text, formatted text and dynamic data in the conversation



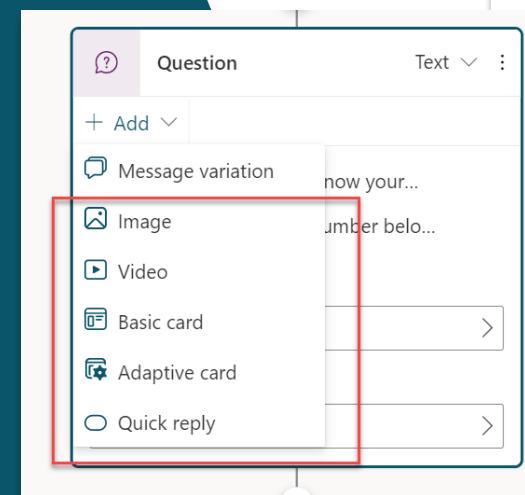
The Question Node



The Question Node is another of the most common nodes used when authoring copilots



It provides capability to ask the user a question and store the data to be used and operated upon



← Question X

Skip behavior

Decide if the question should be skipped if the variable already has a value.

Skip question ⑦

Value ▼

Allow question to be skipped

Ask every time

Reprompt

If the bot doesn't get a valid answer to the question, it can ask the question again.

How many reprompts ⑦

Value ▼

Repeat up to 2 times ▼

Retry prompt ⑦

Customize

Additional entity validation

Configure additional validation behavior beyond the default for the entity type.

Rich Text Responses



Brand new rich text response options including image and adaptive card



Deliver enhanced experiences to customers and users which are more engaging and display data in more dynamic ways

The screenshot shows a Microsoft Power Virtual Agents interface. At the top, there's a toolbar with a question mark icon, the word "Question", a "Text" dropdown, and three dots. Below the toolbar, a "Message variation" card is displayed. This card has a purple header with a question mark icon and the text "Message variation". It contains the text "now your... number belo...". A red box highlights a list of options: "Image", "Video", "Basic card", "Adaptive card", and "Quick reply". Below this, another card is shown with a purple header "Message variations" and the text "We have found your order details and the...". This card displays an "Order Confirmation" section with "Order Confirmation" status, "Coffee Bulk Order - 12 Pcs", and "ABC-123". It also shows submission details: "Submitted By" (empty), "Submitted On" (12/12/2021), "Order Amount" (\$450.00), and "Status" (Pending Packing). At the bottom, it lists "Product A Amount" (\$400.00), "GST" (\$50.00), and "Order Amount" (\$450.00).

The screenshot shows a Microsoft Power Virtual Agents interface. At the top, there's a toolbar with a question mark icon, the word "Question", a "Text" dropdown, and three dots. Below the toolbar, a "Message variation" card is displayed. This card has a purple header with a question mark icon and the text "Message variation". It contains the text "now your... number belo...". A red box highlights a list of options: "Image", "Video", "Basic card", "Adaptive card", and "Quick reply".

Use variables to navigate customers to tailored content



Direct your customers to content you want them to see



Add variables to keep customer information for later in the conversation

The screenshot shows the Microsoft Power Virtual Agents interface. At the top, a 'Phrases' section lists customer queries like 'please can I check my order', 'check order', 'confirm order status', 'update on order status', and 'check when order is due'. Below this is a 'Question' node with a 'Text' input field containing the placeholder 'What would you like to do with your...'. Underneath is an 'Identify' section with a 'Select options for user' dropdown set to 'Order Action'. A 'Save response as' field at the bottom of the node is highlighted with a red box and contains the value '{x} Global.Customer... choice >'. To the right, a 'Variable properties' panel is open, also with a red border around its title. It shows the 'Variable name' as 'Global. CustomerAction', 'Type' as 'choice', and a 'Reference' section with a question node and its description. The 'Usage' section at the bottom has a radio button for 'Global (any topic can access)' selected, and two unchecked checkboxes for 'Allow to carry between sessions' and 'External sources can set values'.

Phrases

please can I check my order
check order
confirm order status
update on order status
check when order is due

+

Question Text

+ Add

What would you like to do with your...

Identify

Order Action

Select options for user

Save response as

{x} Global.Customer... choice >

+

Variable properties

Variable name

Global. CustomerAction

Type

choice

Reference

Question
What would you like to do with your order?

Type (choice) derived from here
Variable gets value from this node if empty

[View all references](#)

Usage

Topic (limited scope)

Global (any topic can access)

Allow to carry between sessions

External sources can set values

Entities and Slot-filling capabilities



Copilots can intelligently avoid repetitive conversations



Enhances your efficiency as a maker



Copilots can guide you to making the best experience

Shipping Method

Name * Shipping Method

Description Description (optional)

Method

Ground Shipping

Air Shipping

Local Shipping

Smart matching

off

The Smart matching option enables the bot's understanding of natural language. This can help match misspellings, grammar variations, and words with similar meanings.

If the bot isn't matching enough related words, enhance the bot's understanding further by adding synonyms to your list items.

Learn more about entities

List items Enter item

Item

Synonyms + Synonyms

+ Synonyms

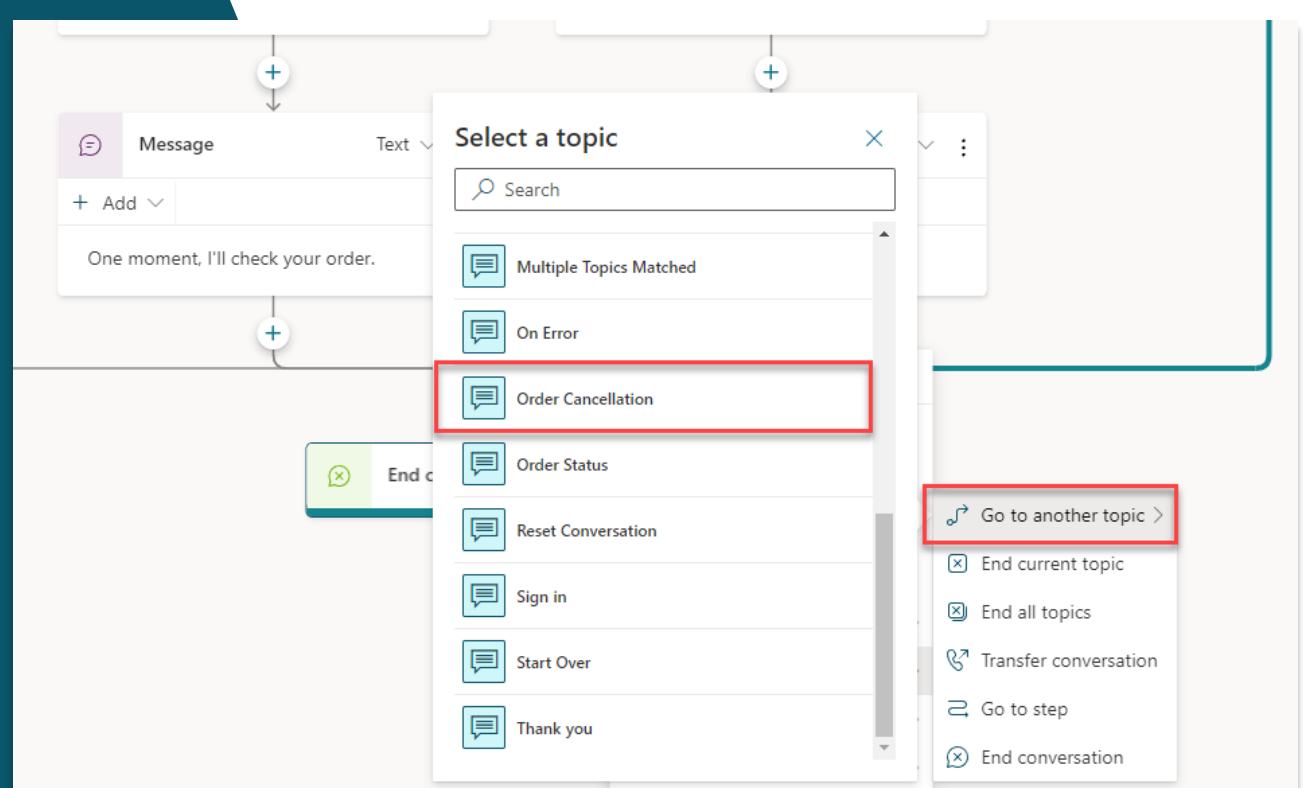
+ Synonyms

Topic Management

 **Re-direct and connect customers to related topics**

Use it when:

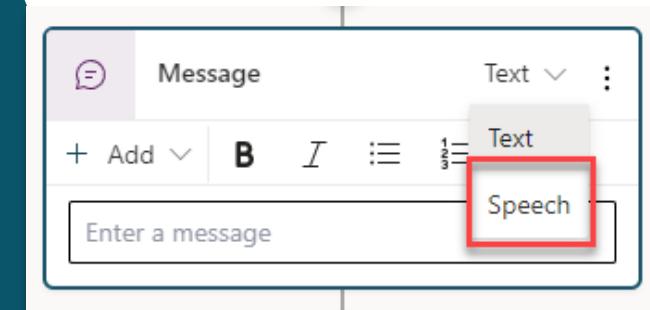
A conversation requires more than one topic, such as when you need to ask a clarifying question to determine which topic the user needs



Use enhanced speech authoring capabilities



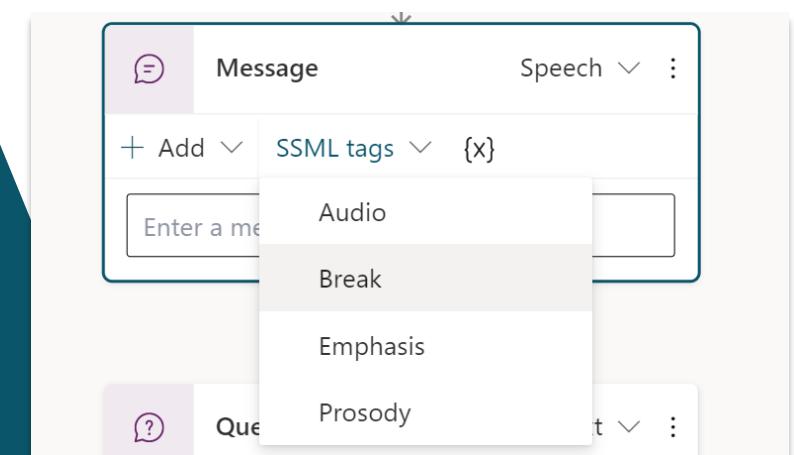
Directly add SSML overrides



Enhances speech enabled text copilots



Tailor the best experience for your customers



Productivity and Pro Code Options



Author copilots faster with productivity options including copy and paste



Use the code view to quickly code message content



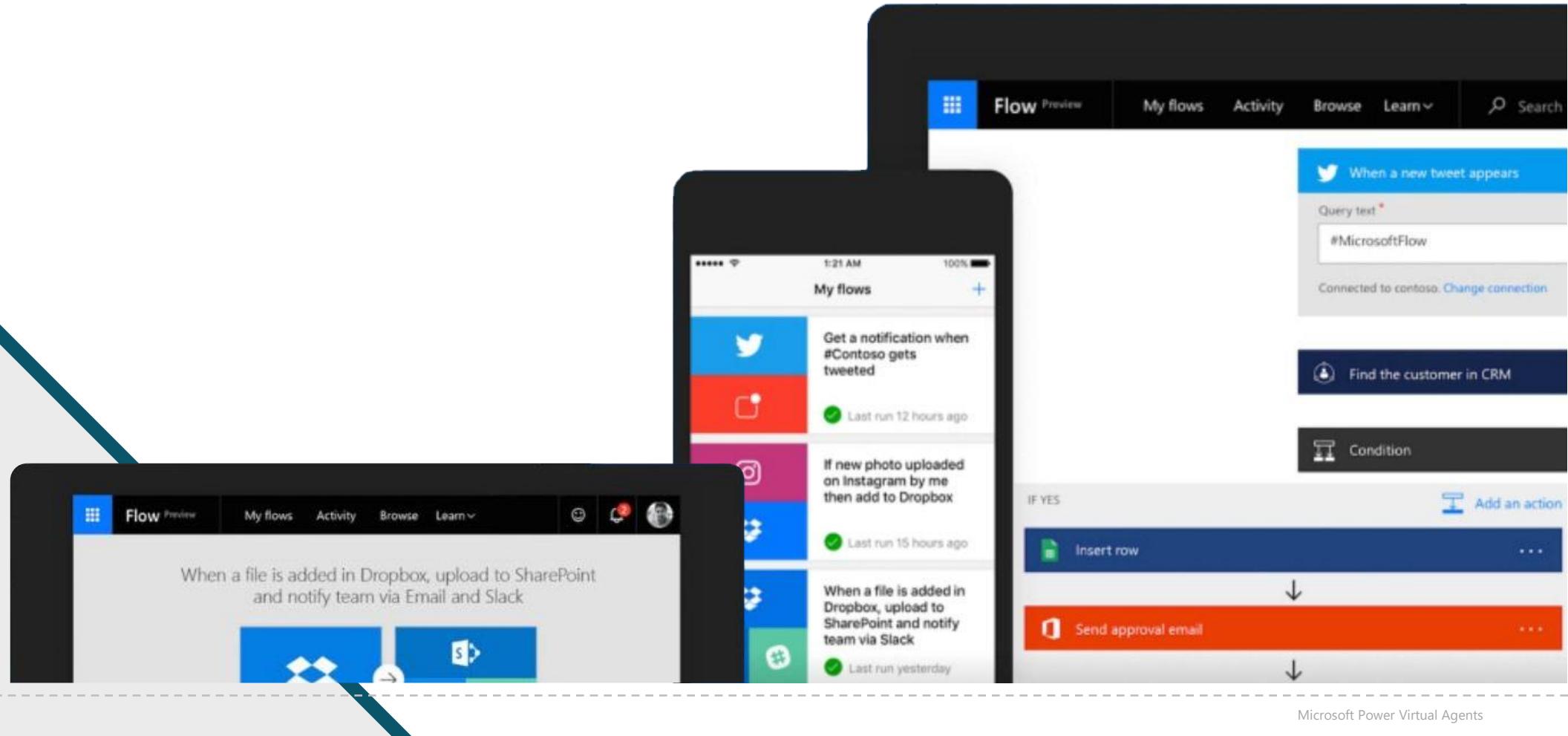
Modify anywhere dialog flow without disruption

```
Topics > Check Order - Contoso Coffee ▾
1 kind: AdaptiveDialog
2 beginDialog:
3   kind: OnRecognizedIntent
4   id: main
5   intent:
6     displayName: Check Order - Contoso Coffee
7     triggerQueries:
8       - order delivery
9       - I have a question when my order will be delivered
10      - I have a question on the time for my order
11      - I have a question about my order
12      - question about my order status
13      - question about my order
14      - confirm my order
15      - order confirmation
16      - order check
17      - check my order
18      - Check order status
19
20 actions:
21   - kind: SendMessage
22     id: sendMessage_4KMeq4
23     message:
24       text:
25         - Thank you for your message! I can certainly check the order for you.
26         - Thank you very much for your message. I can absolutely help with your request!
```

Copilot Studio + Power Automate

Microsoft Power Automate

is an online workflow service that **automates actions across apps and services**



Connectivity & integration



Built-in connectivity to

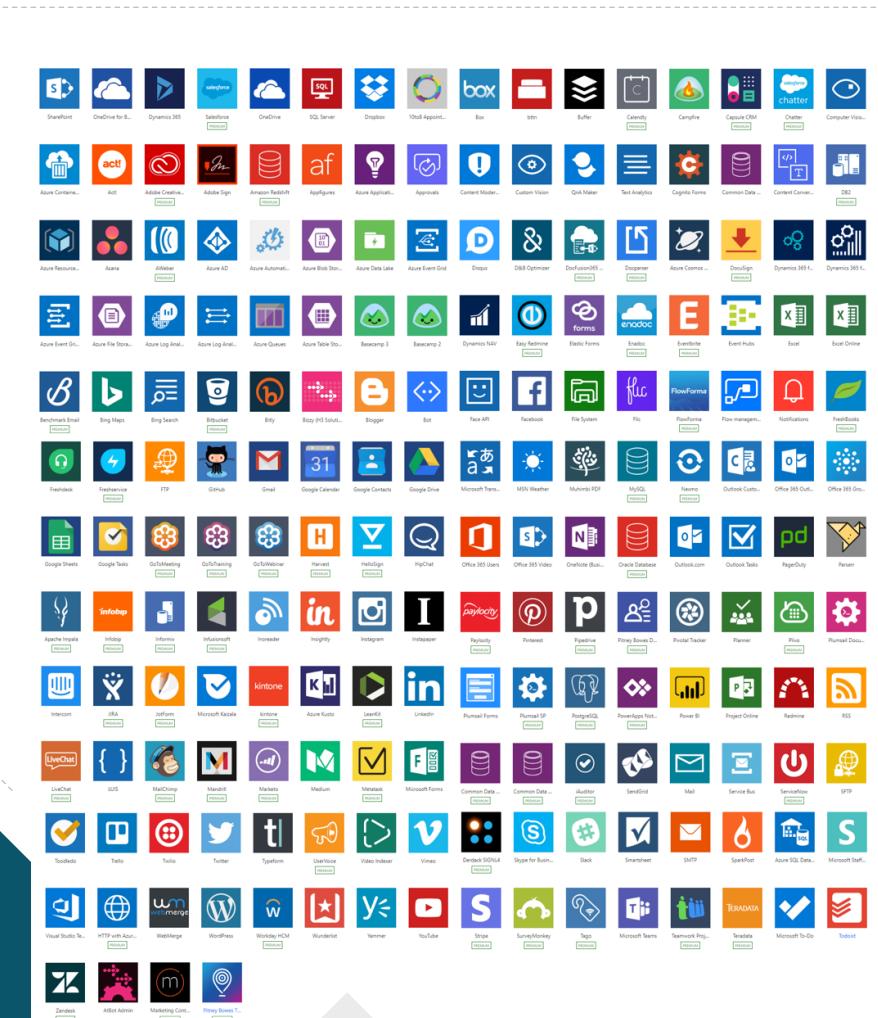
- 1000+ SaaS cloud services
 - File providers
 - Databases
 - Web APIs
 - Productivity apps, etc.

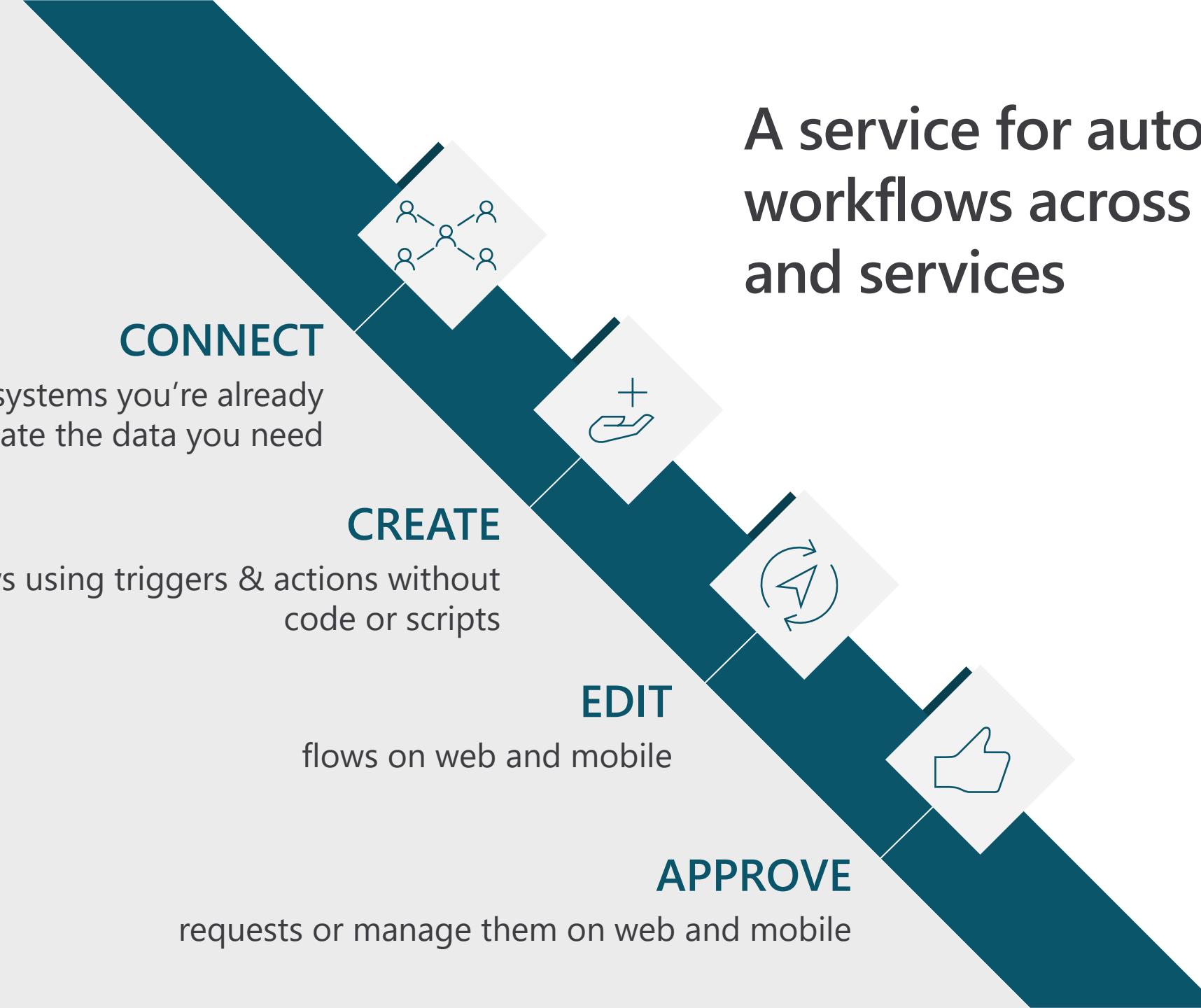


Connect to on-premises systems via Data Gateway



Pluggable extensibility via Custom Connectors to integrate existing LOB systems into Power Automate





A service for automating workflows across apps and services

CONNECT

to data & systems you're already using, and create the data you need

CREATE

workflows using triggers & actions without code or scripts

EDIT

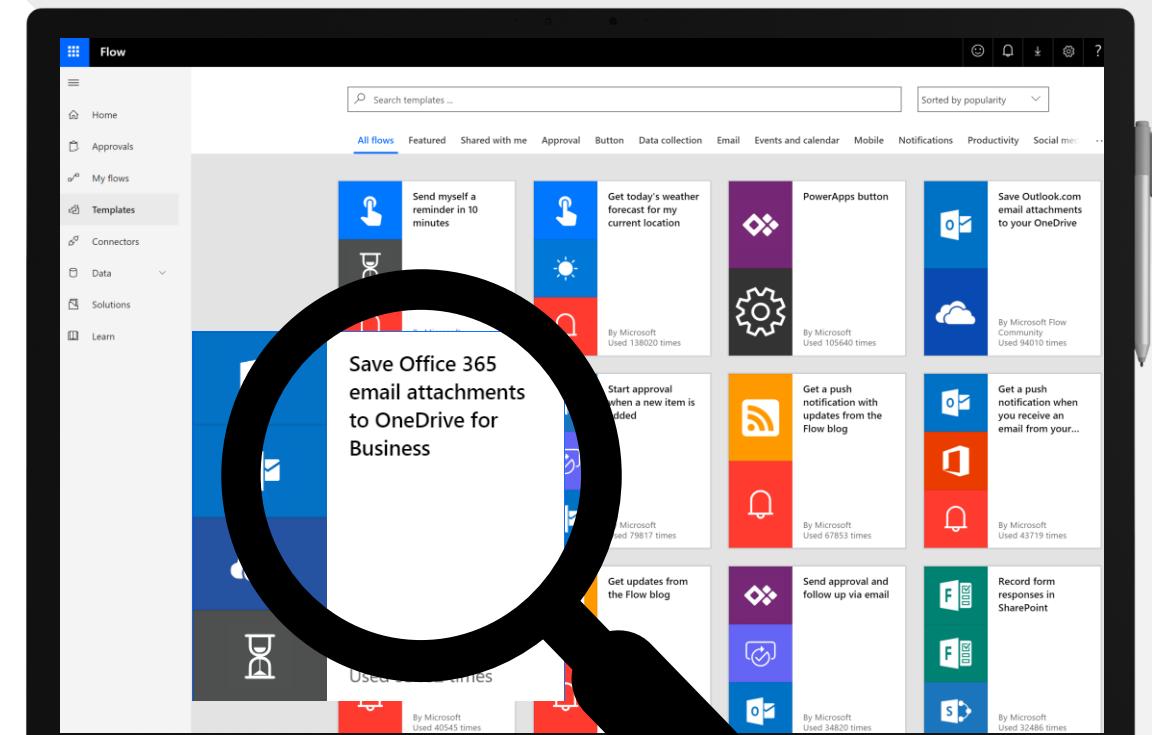
flows on web and mobile

APPROVE

requests or manage them on web and mobile

Get started with a growing library of templates

Jumpstart flows using over 100+ templates for common scenarios
Connect services you're already using in more meaningful ways



Microsoft Power Platform

The low-code platform that spans Office 365, Azure, Dynamics 365, and standalone applications

Innovation anywhere. Unlocks value everywhere.



Power BI
Business analytics



Power Apps
Application development

- Canvas Apps
- Model-driven Apps



Power Pages
Secure business websites



Power Automate
Process automation



Copilot Studio
Intelligent Copilots



Data connectors



AI Builder



Dataverse

Unlock your imagination with Power Automate + Copilot Studio



Copilot Studio uses location-based services (LBS) to provide personalized services



2-factor authentications to increase security



Proactively recommends new promotions, benefits, and better rates to your customers



Check user eligibility and submit applications on their behalf



Remote diagnosis for IOT devices



Make appointments for your customers



Get a picture of the receipt from employee and use Azure AI for expense reimbursement (integration with Azure AI)

Create a Flow from Copilot Studio



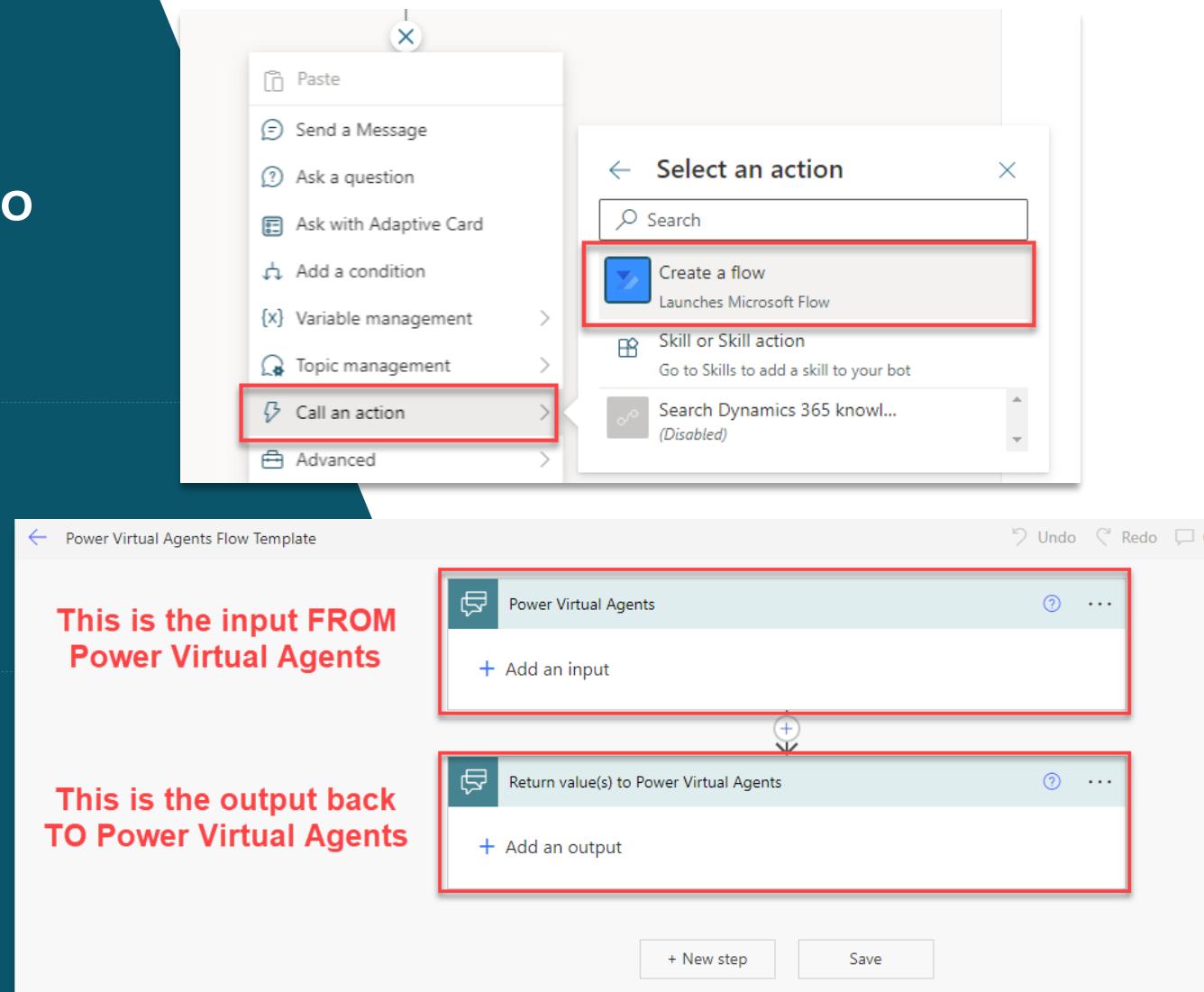
Directly within the Copilot Studio canvas, click 'Create a flow'



Power Automate opens and creates the input and output to pass data



Add your own custom logic in between to configure it to meet your needs



Manage the return of data in Copilot Studio from Power Automate



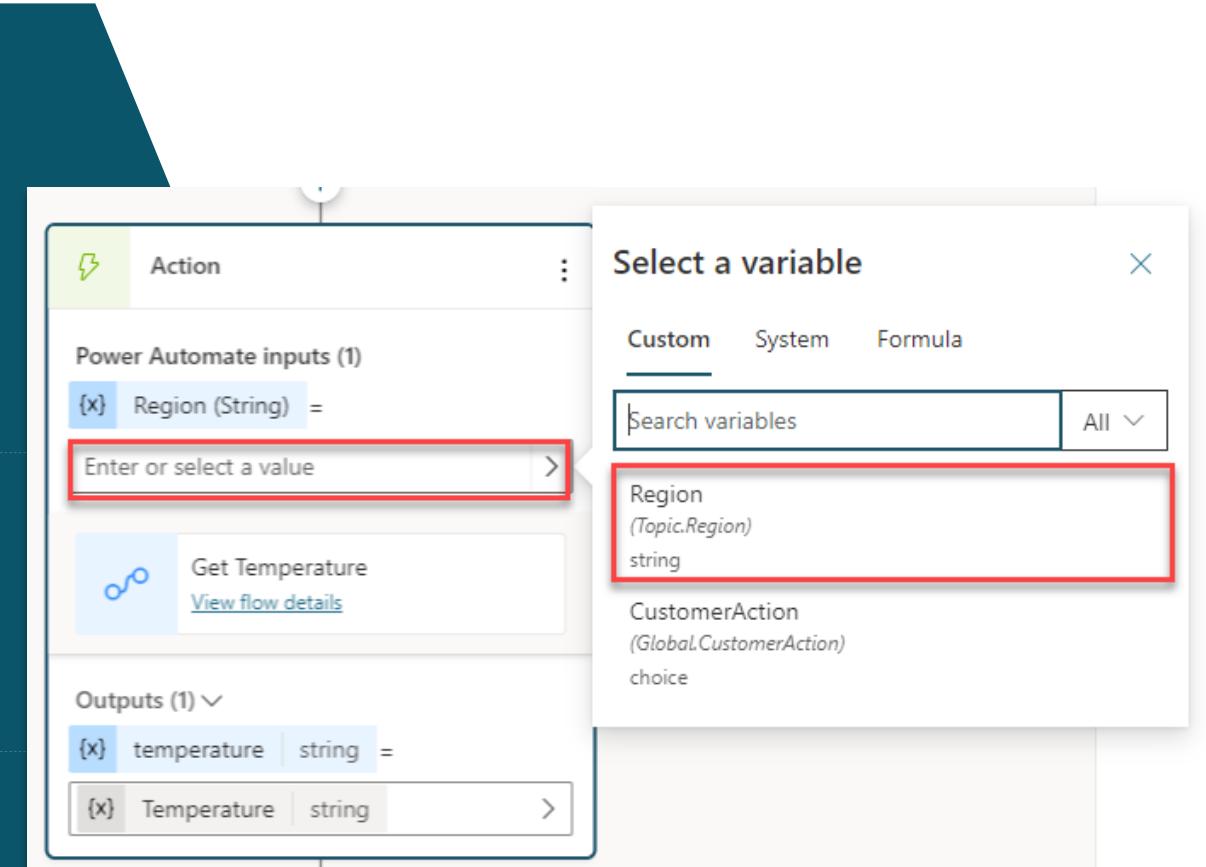
Specify which variables to send to Power Automate within Copilot Studio



Save data from Power Automate into Copilot Studio variables



Use those variables to perform conditional logic, calculations or display them to the user



Closing: Wrap up and next steps

Visit Copilot Studio to learn more
and request a demo

Technical details about the application are
available in our [help documentation](#)

Check [Copilot Studio Blog](#) to learn more
best practices and updates

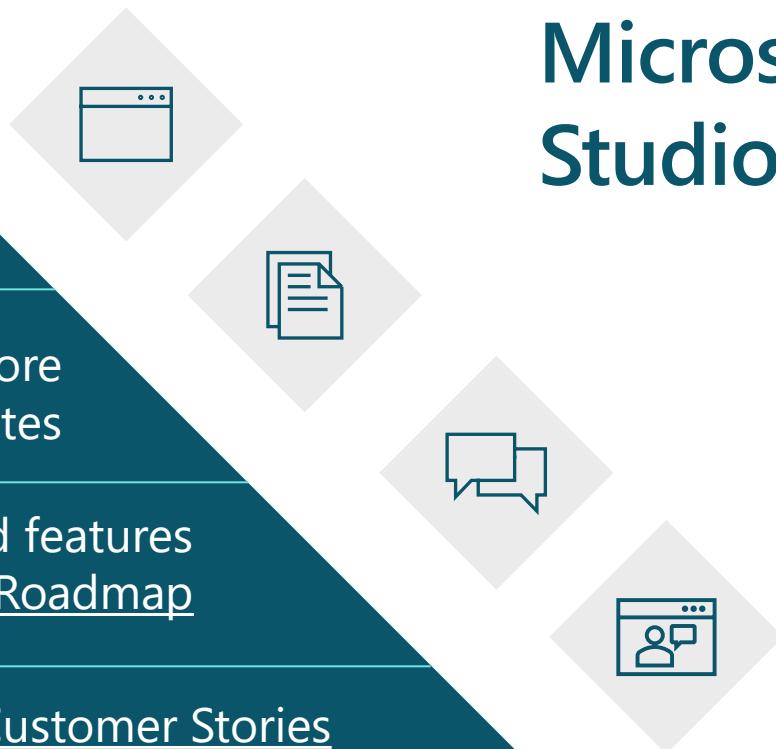
View upcoming and planned features
on the [Roadmap](#)

Explore [Customer Stories](#)

For questions please engage in our
[Community forum](#)

Learn about the [Power Platform](#)

Learn more about Microsoft Copilot Studio







Thank
You

Need Help Later?

Continue the Conversation!

Contact me on LinkedIn or e-mail!



LinkedIn: [bit.ly/AJAnsari](https://www.linkedin.com/in/bit.ly/AJAnsari)

aja@dswius.com