



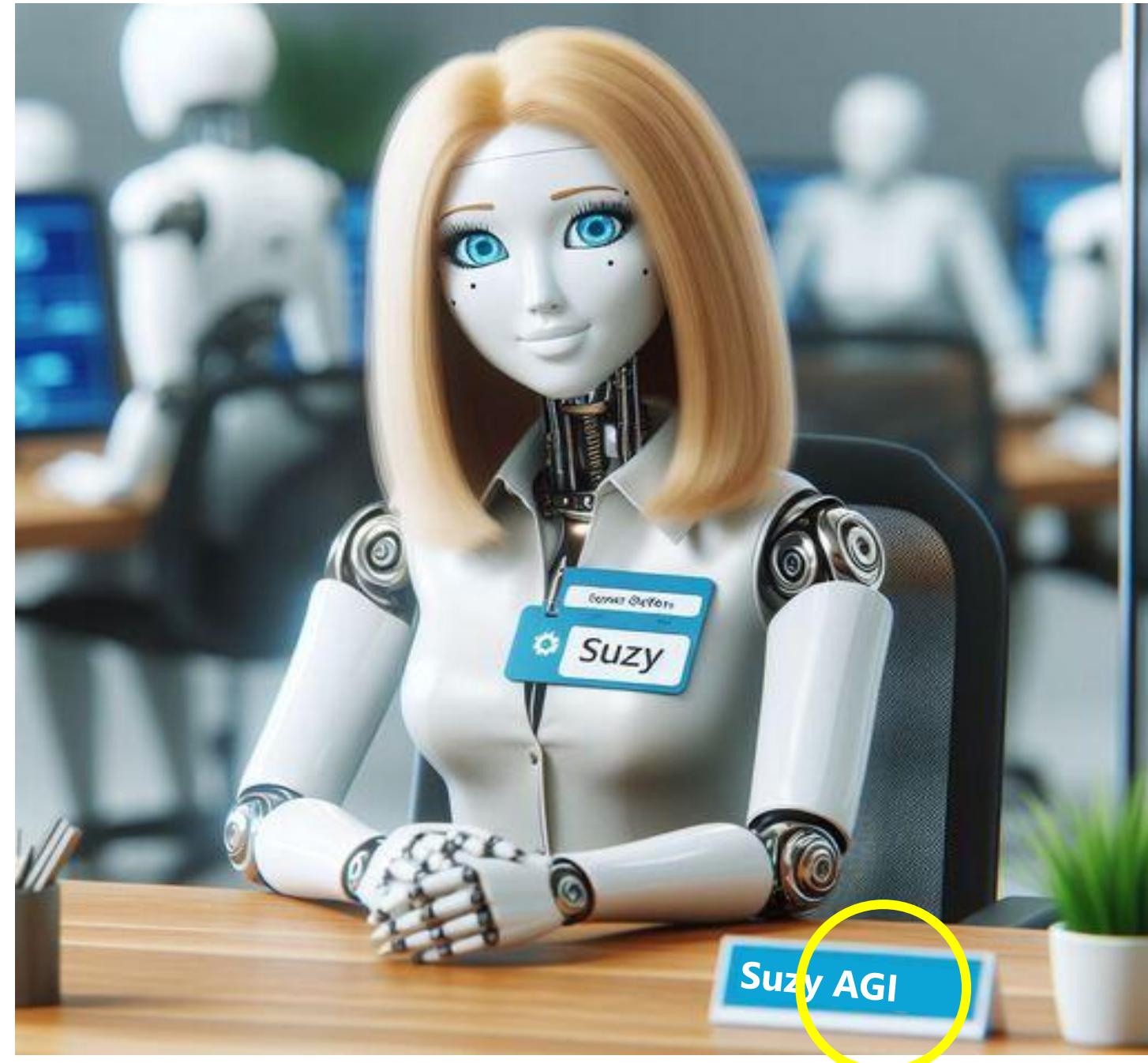
Conversational AI

Where to start & how to drive value

Suzy Agi, Principal Global Black Belt
Power Platform, Americas



I am not
Artificial
General
Intelligence



Flight Map

- 
- 1 Address the “why now?” question
 - 2 Clarify the Copilot Conundrum
 - 3 Provide a brief overview of Copilot Studio
 - 4 Share some Customer examples
 - 5 Provide some insights into how to drive value
 - 6 You walk away with resources & how to get started

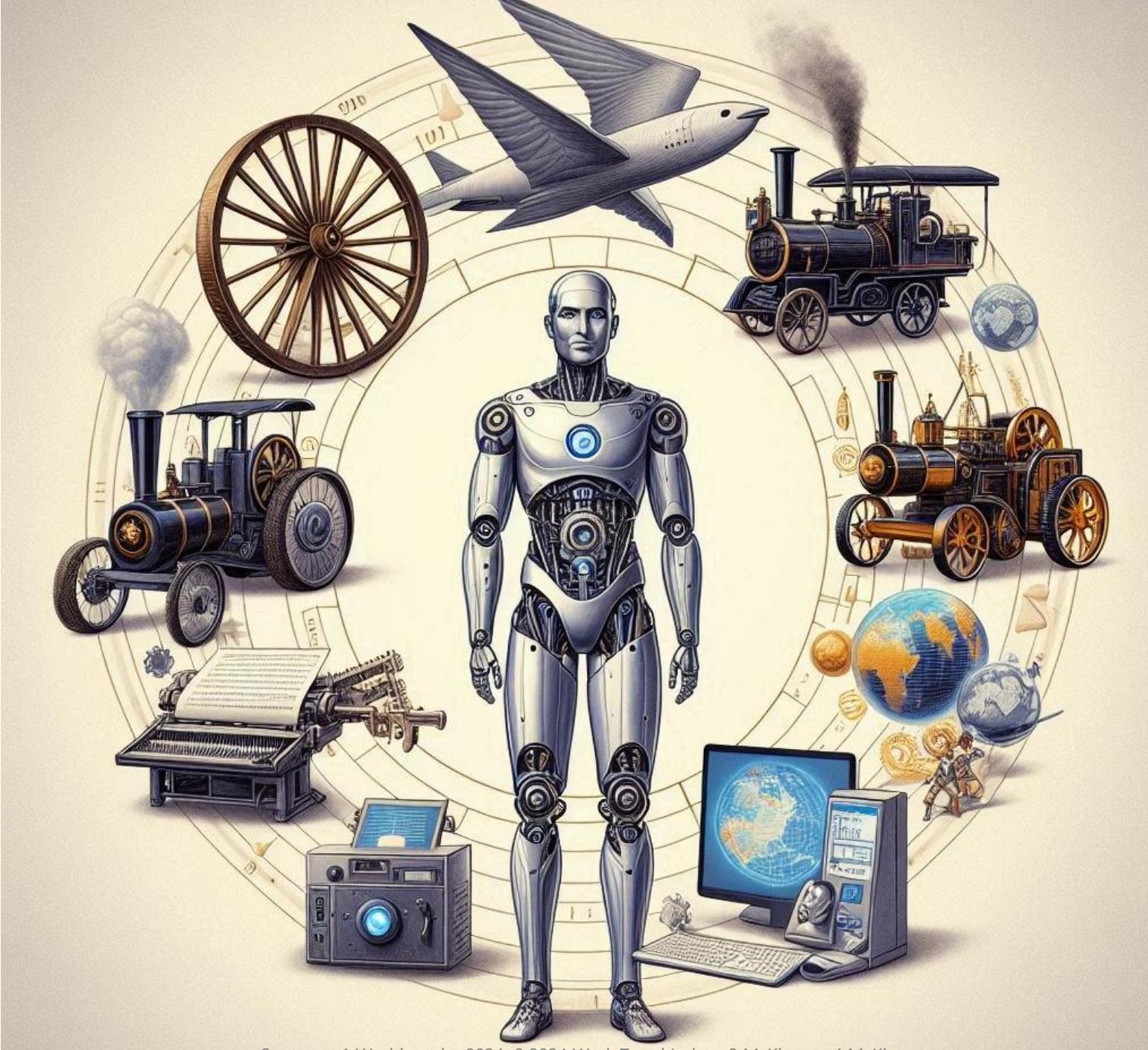


Photo designed by
Microsoft Designer

Microsoft is betting our business on AI



"We're in the midst of a massive platform shift, with the new generation of AI, that's going to transform pretty much every sector and every category of computing."

A handwritten signature of Satya Nadella's name, "Satya N.", in black ink.

Satya Nadella
Chairman and CEO, Microsoft

Gen AI has the potential to automate work activities that absorb **60% to 70% of employees' time.**¹

Gen AI could add the equivalent of **\$2.6 trillion to \$4.4 trillion** annually across all industries.¹

Gen AI could increase global GDP by 7%—nearly **\$7 trillion**—and boost productivity growth by **1.5 percentage points.**²

1. McKinsey The Economic Potential of Generative AI.

2. Goldman Sachs, Generative AI could raise global GDP by 7%, Apr 2023.

We are at a(nother) tipping point

Now is the Time

91%

of the individuals report using gen AI for work
and most are excited about its potential.

13%

of the companies have successfully
implemented multiple AI use cases.

but



Employee led

Core vision led



Gen AI's next inflection point:
from **employee experimentation** to **organizational transformation**

<https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/gen-ais-next-inflection-point-from-employee-experimentation-to-organizational-transformation>



Holland America Line®



Holland America Line®

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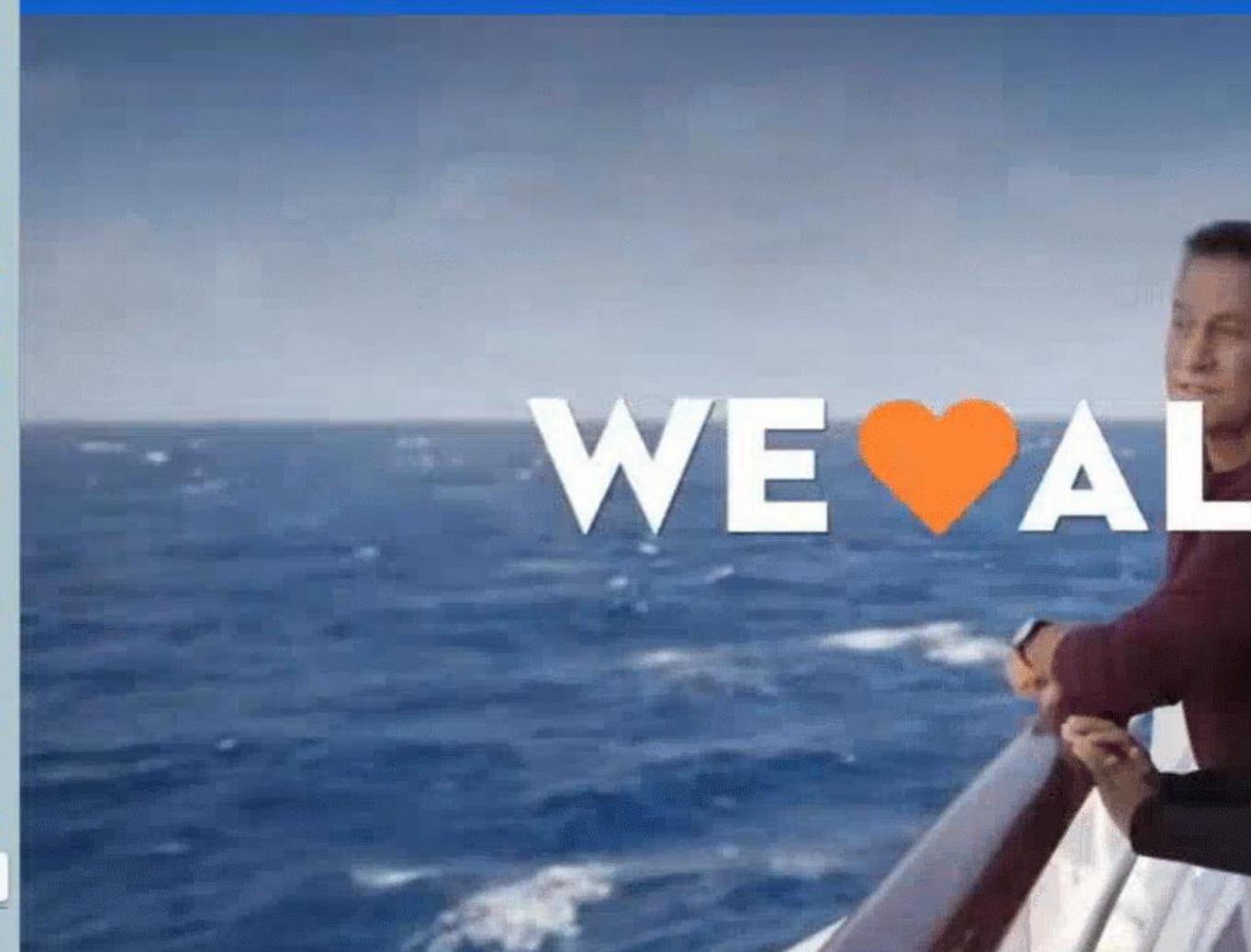
PLUS

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HAL Digital Concierge

Alaska

When would you like to depart for your cruise trip? Please provide the preferred month and year.

August 2025

What is your preferred duration for the cruise trip?

Ask me a question...

A large white cruise ship with multiple decks and orange lifeboats is sailing on blue, slightly choppy water under a clear sky with scattered clouds. The ship's funnel is red with the word "CARNIVAL" written on it.

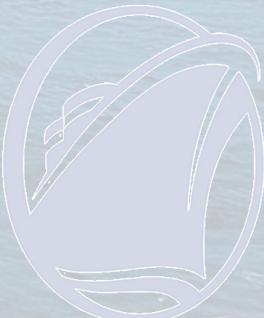
Annual Projections

\$7M Increased Revenue

10% Call Deflection

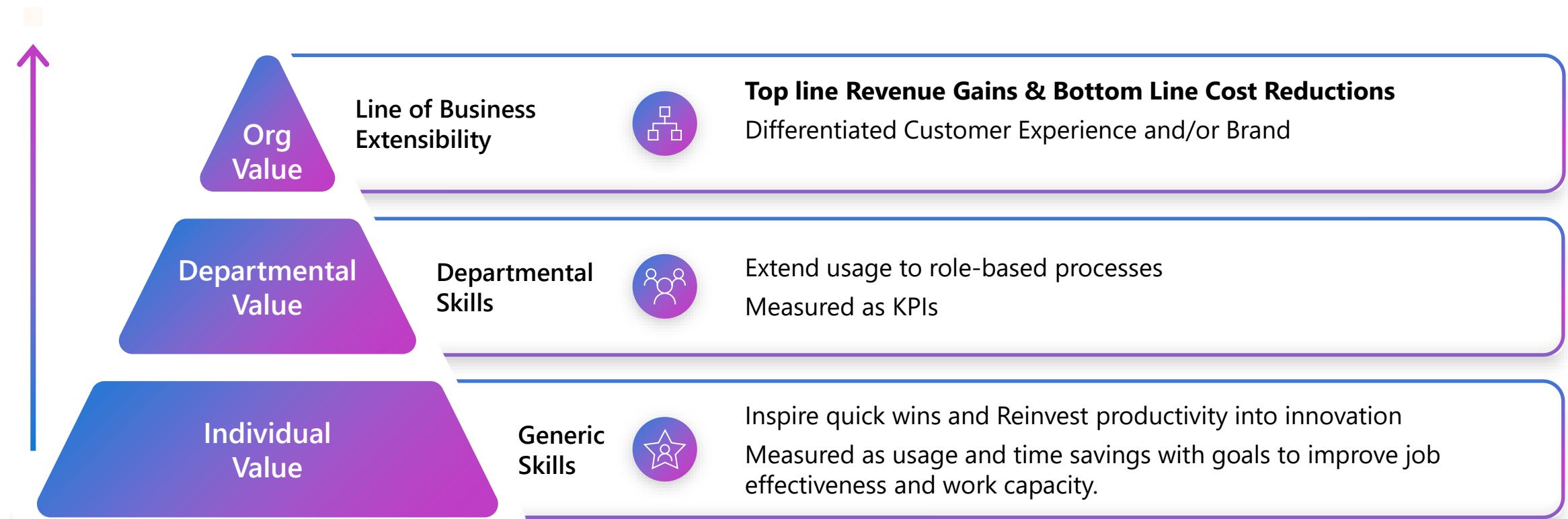
\$780K Cost Reduction

Holland
America



Moving beyond time savings

Grow value from a base of solid usage and individual capacity gains by optimizing departmental processes and impacting the metrics that are important to your organization.



Copilot Confusion?



Copilot! Copilot! Copilot!

Quick Terminology Lesson



Copilot

Human augmentation

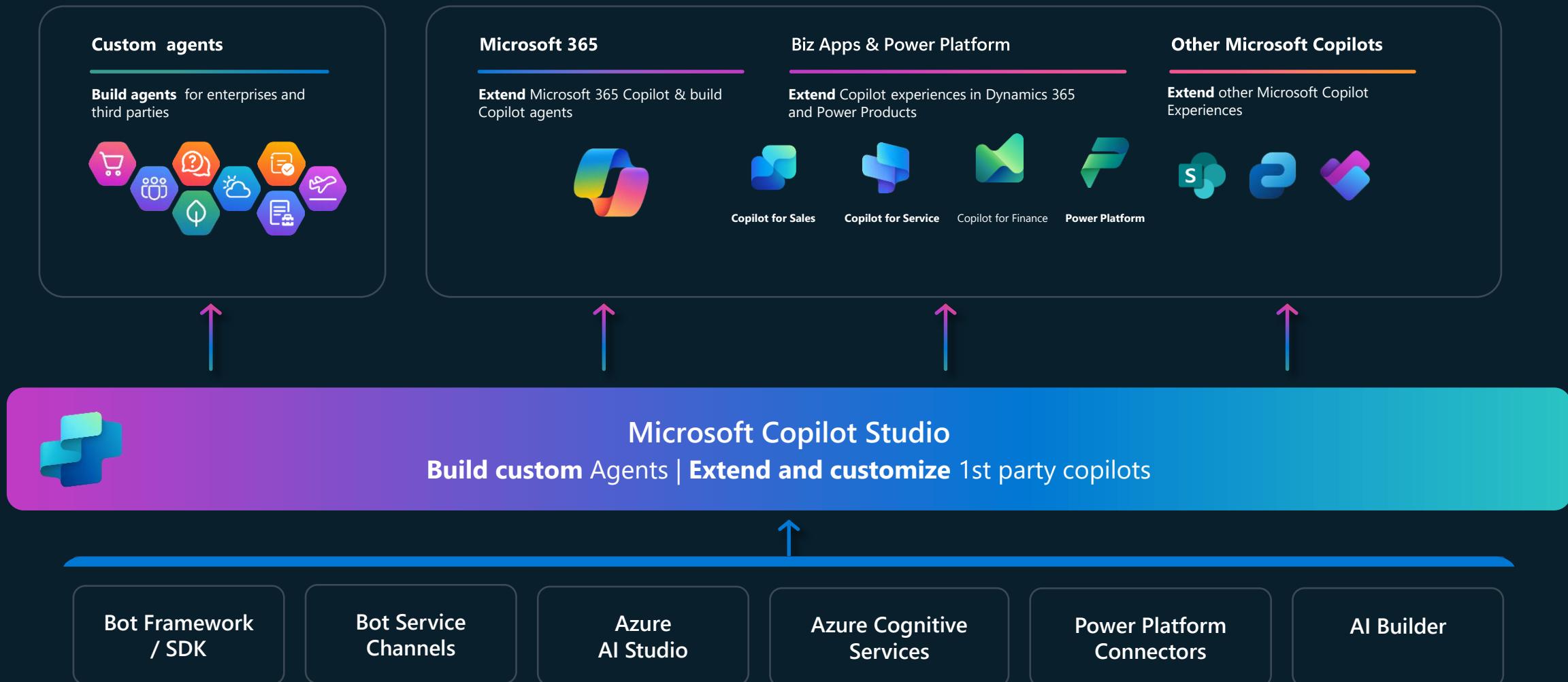


Works as your personal assistant

The UI to AI

Microsoft Copilot Ecosystem

Build and extend across your integrated Microsoft platform



Pre-built agents coming soon to Dynamics 365

Announced Oct 21st

Sales Qualification Agent

Autonomously processes sales leads by researching and prioritizing inbound leads and preparing personalized emails to initiate a conversation with the highest value prospects.

*Public preview: Mar 2025
GA: H1 2025*



D365 Sales

Customer Intent Agent

Autonomously discovers intents from past and current customer conversations across all channels to power dynamic, evergreen self-service and assisted service.

*Public preview: Dec 2024
GA: H1 2025*



D365 Contact Center

Customer Knowledge Management Agent

Extract knowledge from human-assisted cases and draft new/update existing knowledge articles with insights to solve future cases via self-service & assisted service scenarios.

*Public preview: Dec 2024
GA: H1 2025*



D365 Customer Service

Case Management Agent

Automate key tasks throughout the case lifecycle—creation, updates, collab, resolution, follow up, closure—to reduce handle time and alleviate the manual burden on service reps.

*Public preview: Feb 2025
GA: H1 2025*



D365 Customer Service

Scheduling Operations Agent

Optimize technician schedules to account for changing conditions as they arise—such as traffic delays, double bookings, or last-minute cancellations—that often result in conflicts or gaps.

*Public preview: Feb 2025
GA: H1 2025*



D365 Field Service

Sales Order Agent

Responds to customer inquiries about products and catalogs, generates sales quotations, and intakes sales orders.

*Public preview: Dec 2024
GA: H1 2025*



D365 Business Central

Supplier Communications Agent

Processes purchase order confirmations, follows up with suppliers on pending purchases, and helps navigate through the impact of changes to inbound supply.

*Public preview: Feb 2025
GA: H1 2025*



D365 Supply Chain Management

Account Reconciliation Agent

Autonomously reconciles ledger and subledger accounts, flags discrepancies and carries out corrections based on business logic.

*Public preview: Mar 2025
GA: H1 2025*



D365 Finance

Financial Reconciliation Agent

Cleanses financial data from multiple sources and reconciles the data, flagging discrepancies for further review and suggesting mitigations.

*Public preview: Mar 2024
GA: TBD*



Copilot for Finance

Time and Expense Agent

Drafts time entries based on projects forecast and calendars, creates expense reports based on email receipts, and reviews submitted time and expense reports for compliance with policies.

*Public preview: Mar 2025
GA: H2 2025*



D365 Project Operations

Quick Terminology Lesson



Copilot

Human augmentation



Works as your personal assistant

There are only as many Copilots as there are people



Agents

Expert systems that can work autonomously

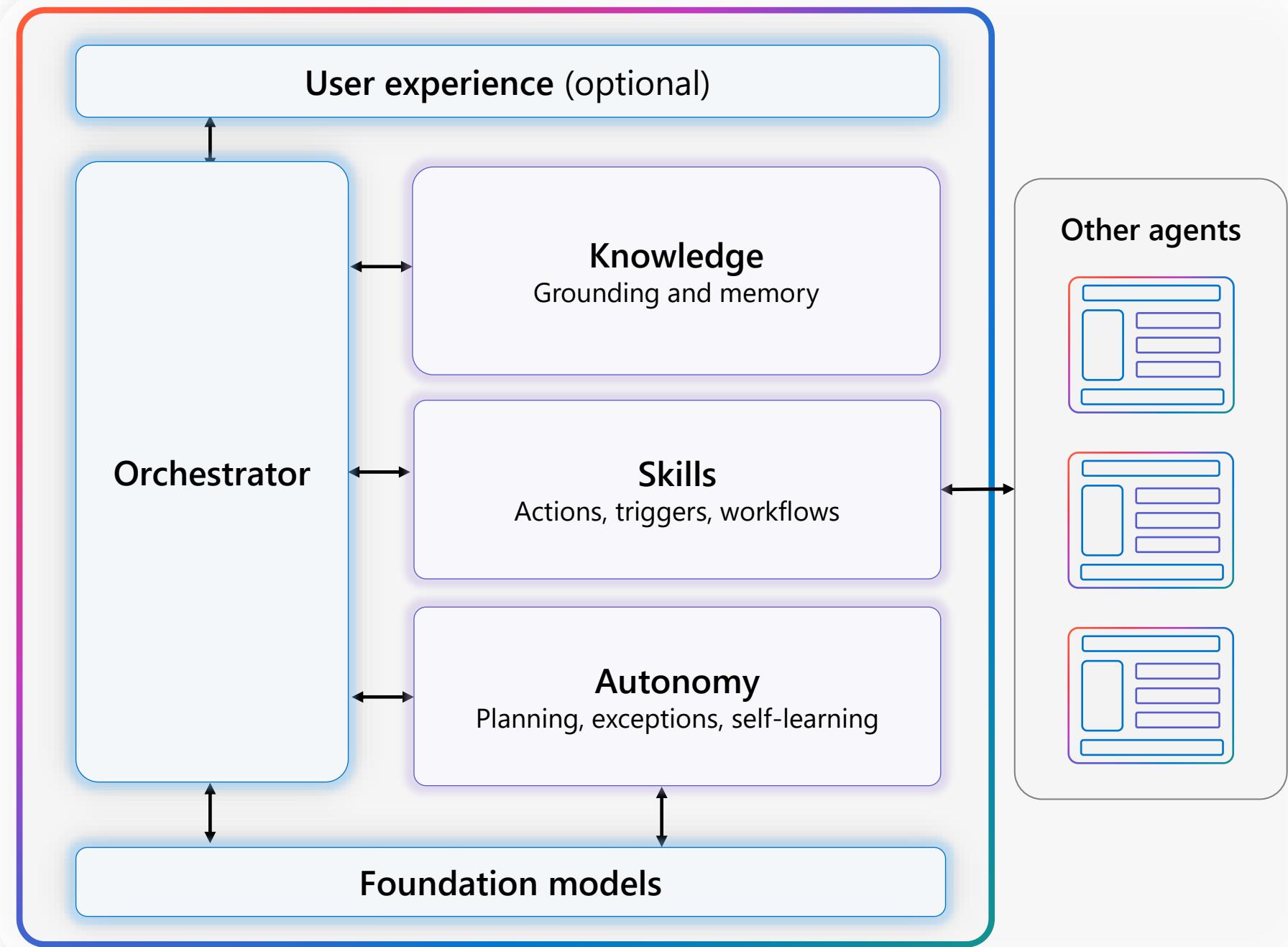
Works on behalf of a process or company

There are more agents than people

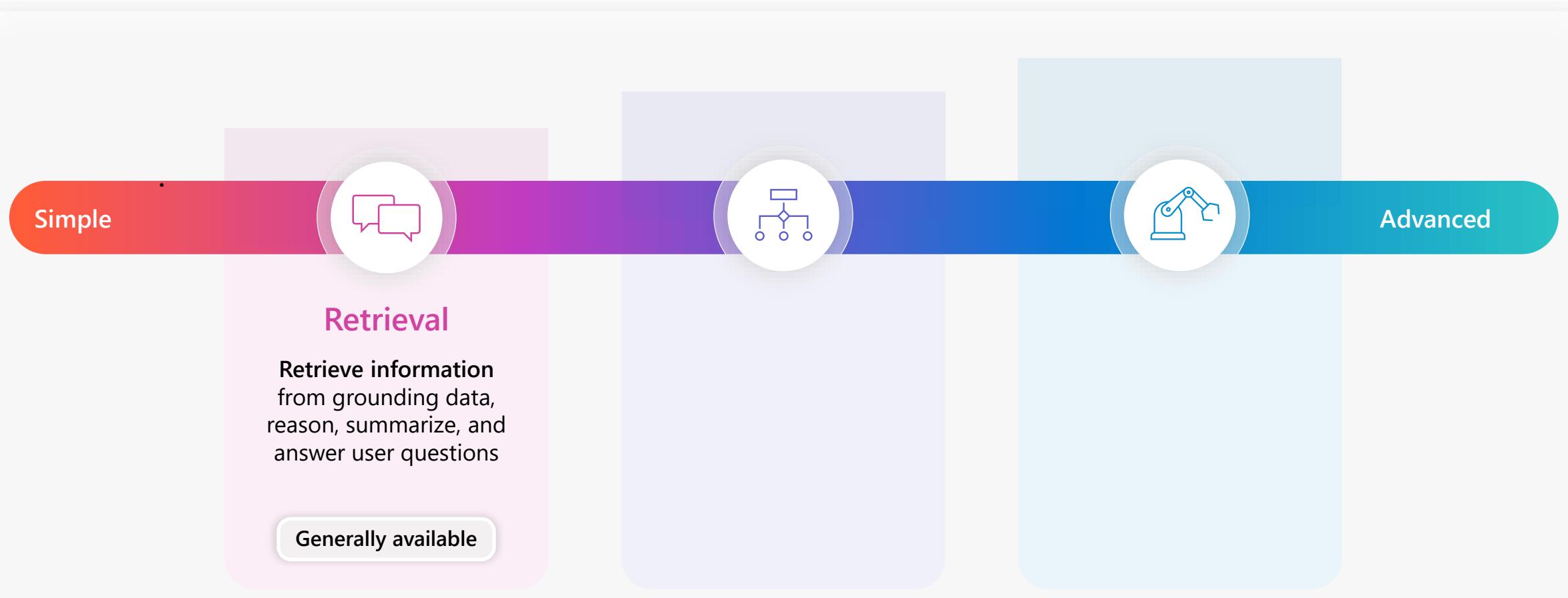


What are Agents?

AI task assistants designed to automate and execute business processes, working with or for a human.



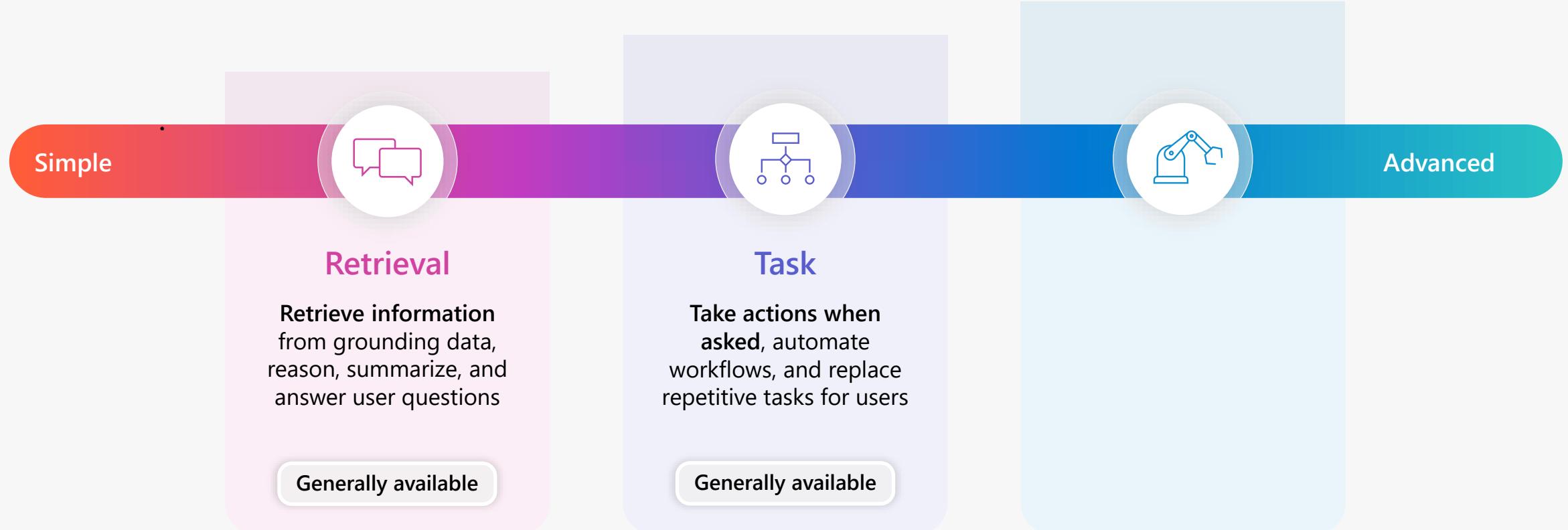
Spectrum of agents



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

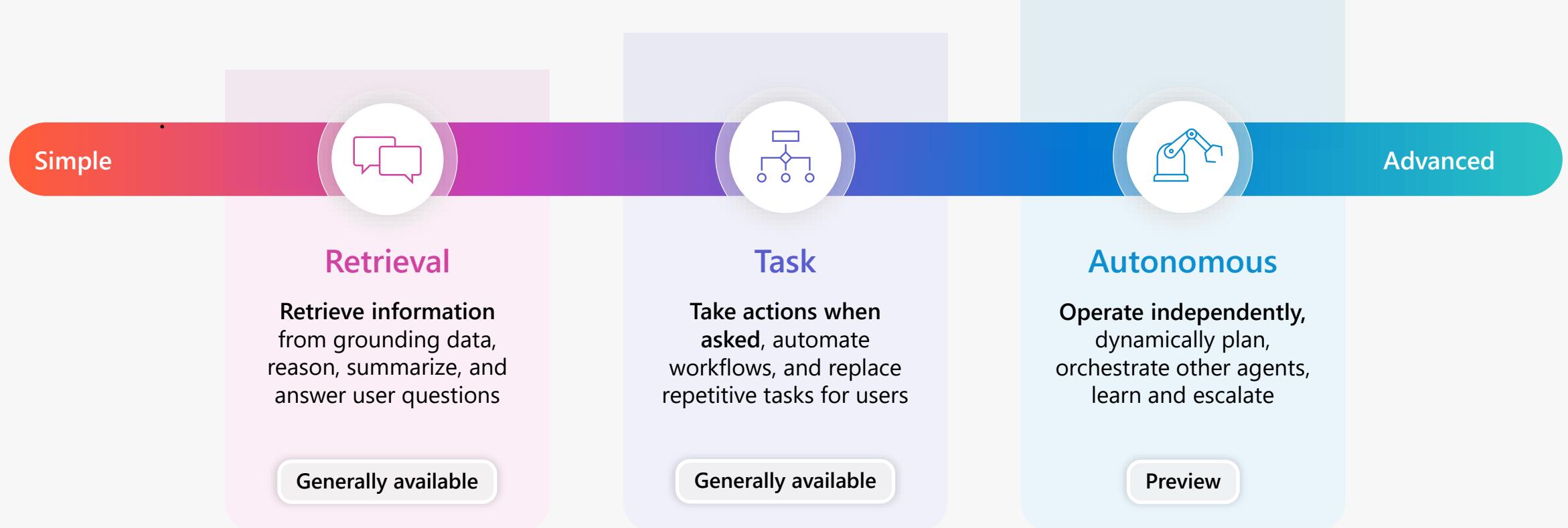


Spectrum of agents



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

Spectrum of agents



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

McKinsey
& Company



Home View Help

1/2 in 5 min Microsoft Teams M

New mail

Quick steps

Read/Unread

Favorites

Inbox 11

Expenses 2

Mona@email.com

Inbox

Drafts

Sent Items

Deleted Items

Junk Email

Archive

Engagement letters

Projects

Need Help General

Send

To: Engagment@McKinsey.com

Market Expansion with Horizon Tech Solutions

Draft saved at 11:00 AM

Dear McKinsey team,

I hope this email finds you well. My name is Mona Kane, and I'm the Marketing Director at Horizon Tech Solutions. We are planning to embark on a new market expansion engagement and would like to inquire about your consulting services to assist us in conducting a comprehensive market analysis.

The engagement involves exploring potential growth opportunities for our latest software solution in the European market. Our goals are to identify key target demographics, understand competitive dynamics, and determine the most effective entry strategy for this region. Given the complexity of the market and our desire to make data-driven decisions, we believe your expertise in market research and analysis would greatly contribute to the success of this initiative.

We plan to kick off this engagement in early November for the analysis phase.

We are particularly interested in the following areas of support:

- In-depth market research to identify industry trends and key competitors
- Consumer behavior analysis in relation to our product offering
- Recommendations for market entry strategies, including pricing and positioning
- Risk assessment and potential challenges in the European market

Could we schedule an initial discussion to explore how your team might assist us? Additionally, if you could provide some information on your availability, pricing structure, and any relevant case studies or references, that would be greatly appreciated.

I look forward to hearing from you and hope we can collaborate on this exciting engagement.

Best regards,
Mona Kane

Private Preview at
Microsoft Ignite



Your copilot is published. Teach, test and improve

- [Add actions](#) so your copilot can do things for you
 - [Build topics](#) to focus and guide how your copilot answers
 - [Publish your copilot](#) so others can use it
- [Learn more](#)



Details

Edit



McKinsey Agent

Goal

You are an agent that helps to evaluate and staff incoming engagement requests from McKinsey clients.

Instructions

You are tasked with managing client "engagement" requests received via email. An "engagement" refers to a consulting project where the firm is hired by a client to solve a specific business challenge. Your responsibilities include analysing and checking the request, assigning the appropriate partner and employees, notifying external partners and internal stakeholders via email, and ensuring that the engagement is properly logged in the database. It is crucial to follow every step precisely and complete all actions listed once, without skipping any. Once all actions are completed your

Copilot Studio is the platform for Copilot agents

Deploy and use Copilot agents in any system



Microsoft 365

Add Copilot agents that give Copilot focused knowledge and new skills.



Build and customize

your agents using
Copilot Studio



Your applications

Deploy Copilot agents to your website and other line of business applications.



Dynamics 365

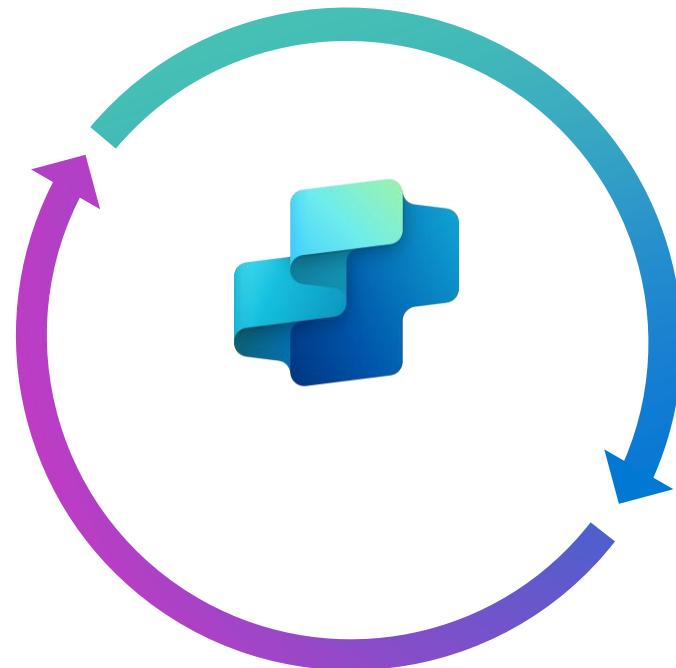
Build Copilot agents that integrate and improve business processes.



Power Platform

Extend Power Platform with Copilot agents that transform your low code apps and pages.

Build & Publish

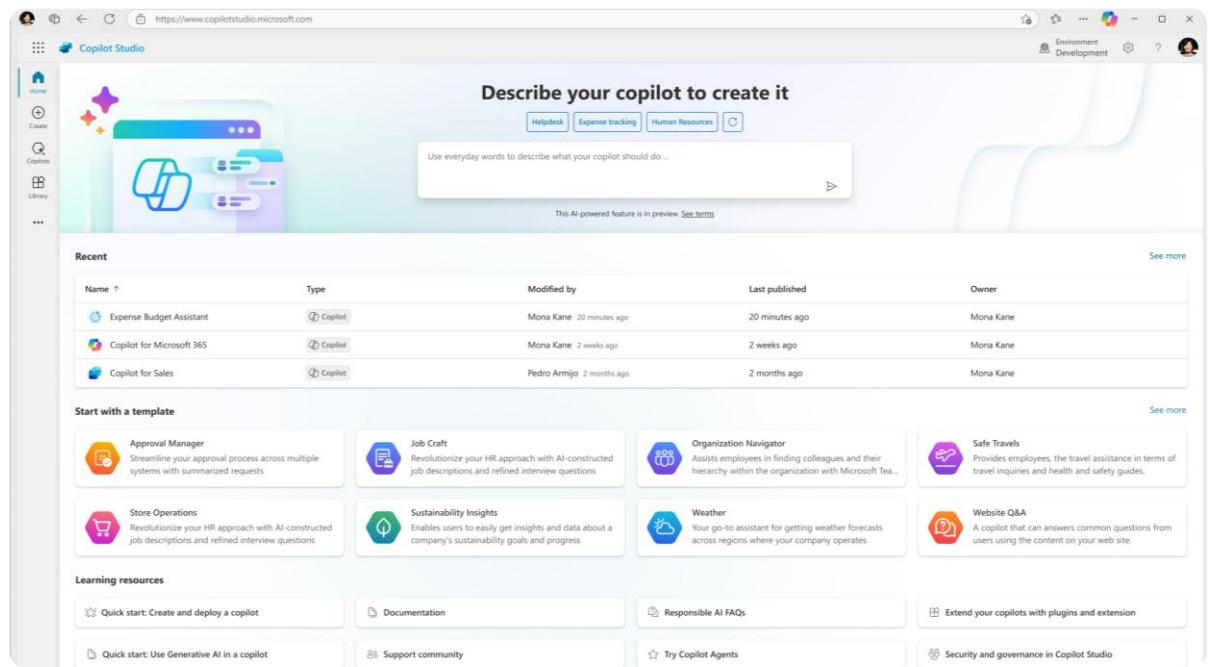


Analyze & Improve

Build & Publish

Create an agent

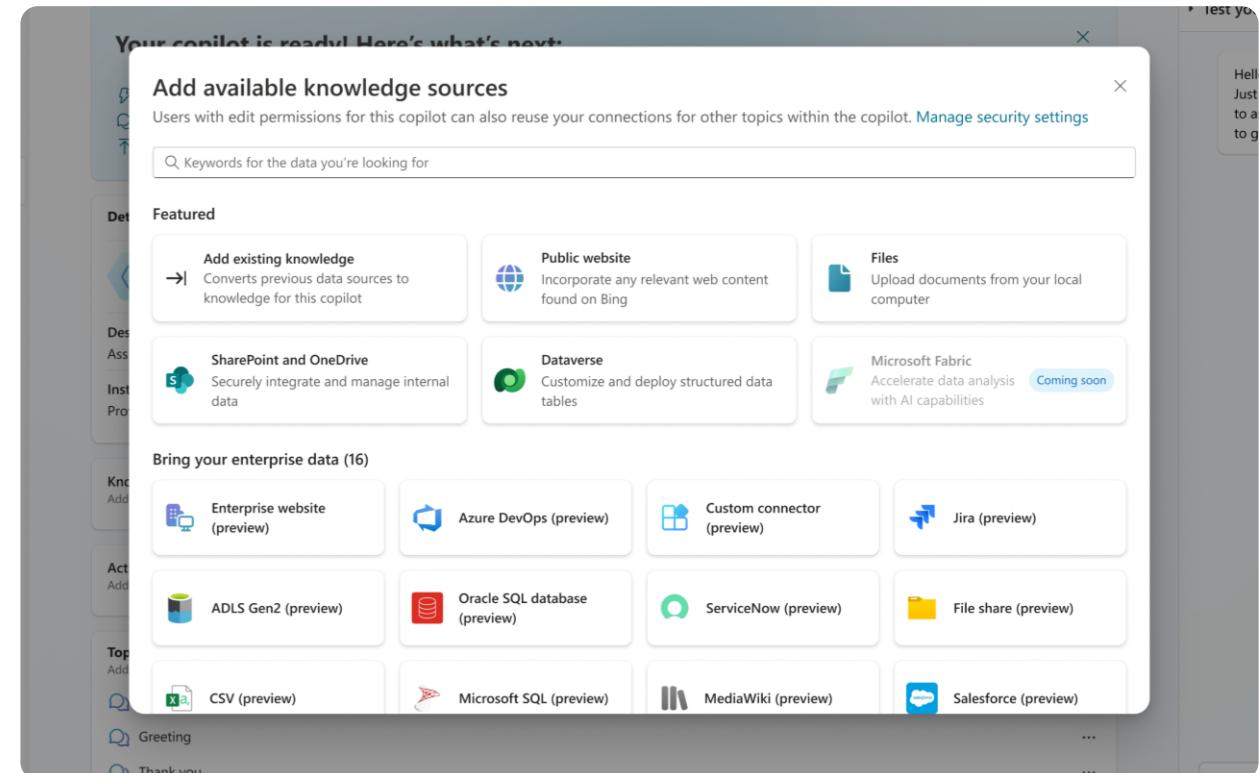
Build an agent and go live within minutes, all from one easy-to-use, E2E SaaS product



Build & Publish

Add knowledge

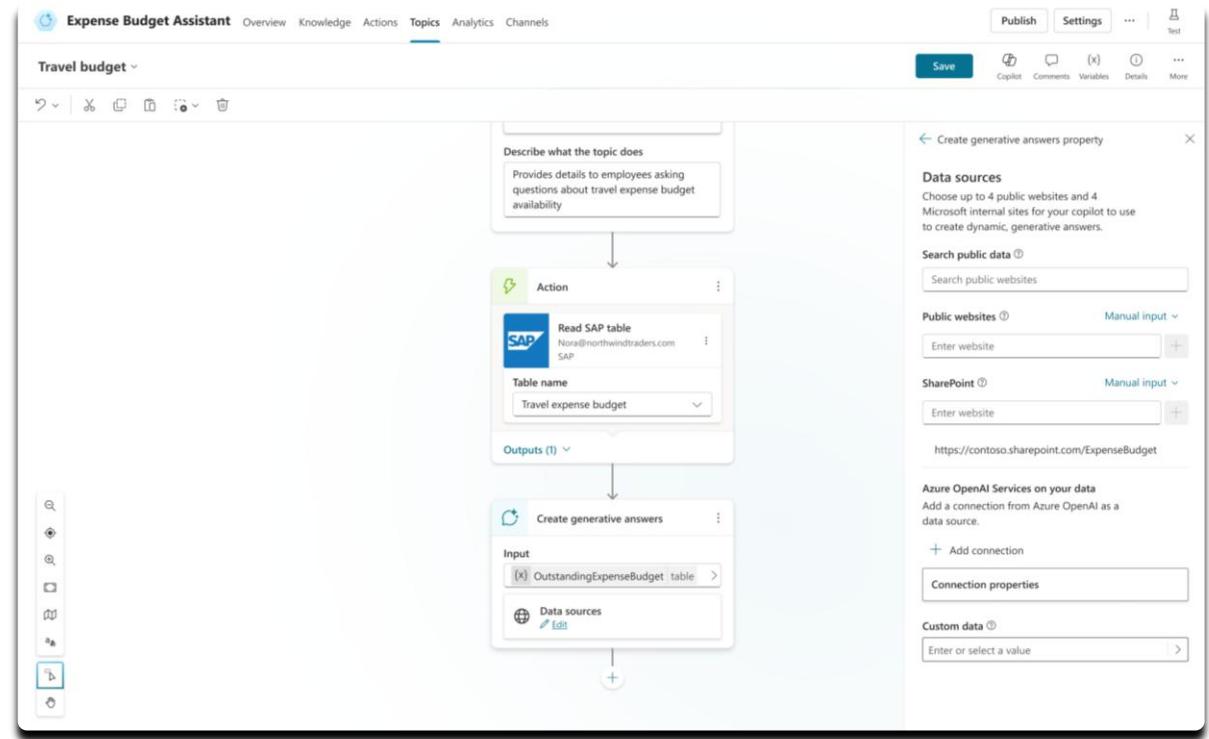
Connect to your enterprise backends and APIs with 1000s of pre-built data connectors



Build & Publish

Customize topics,

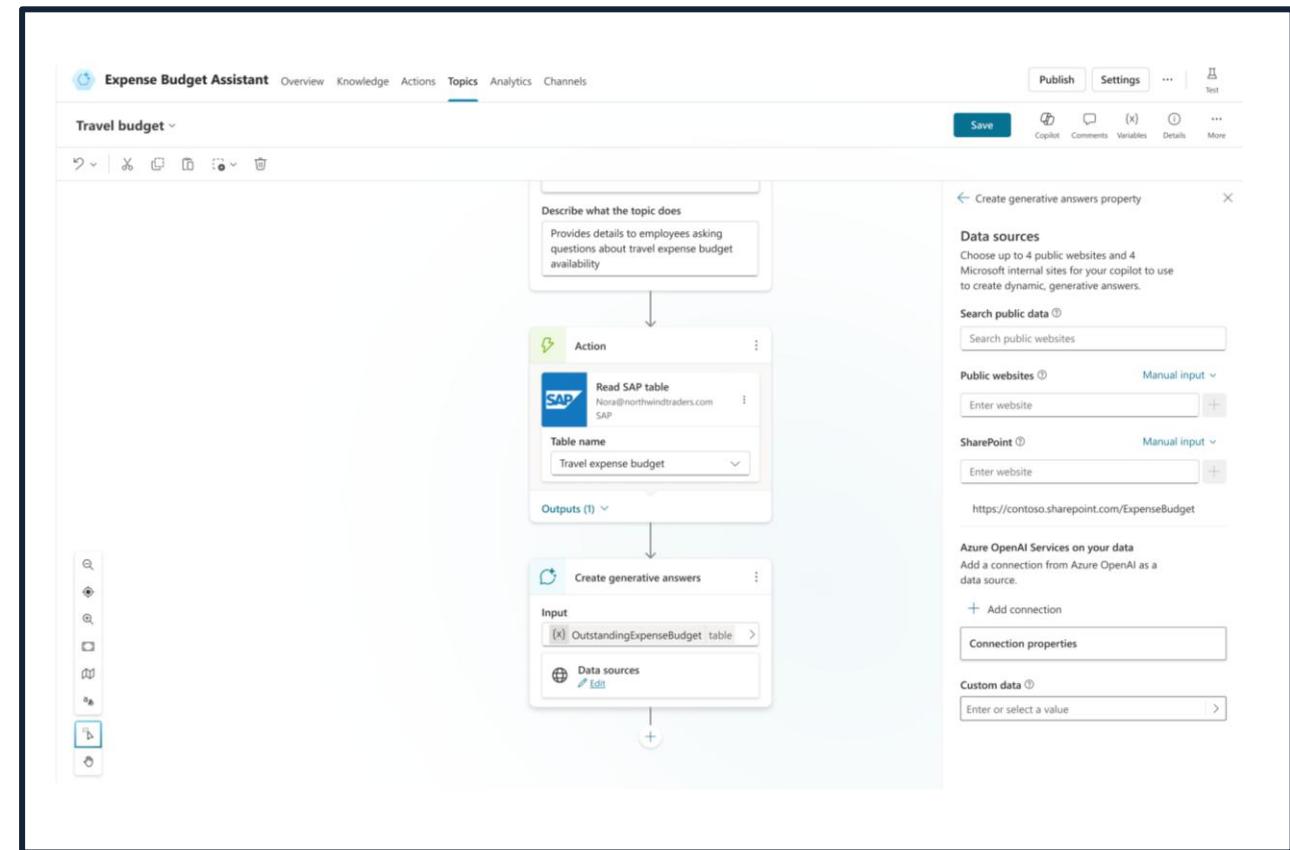
Mix generative responses with step-by-step topics for complete control. Create actions, plugins and connect to your backend systems with 1000s of pre-built connectors



Build & Publish

Customize topics,

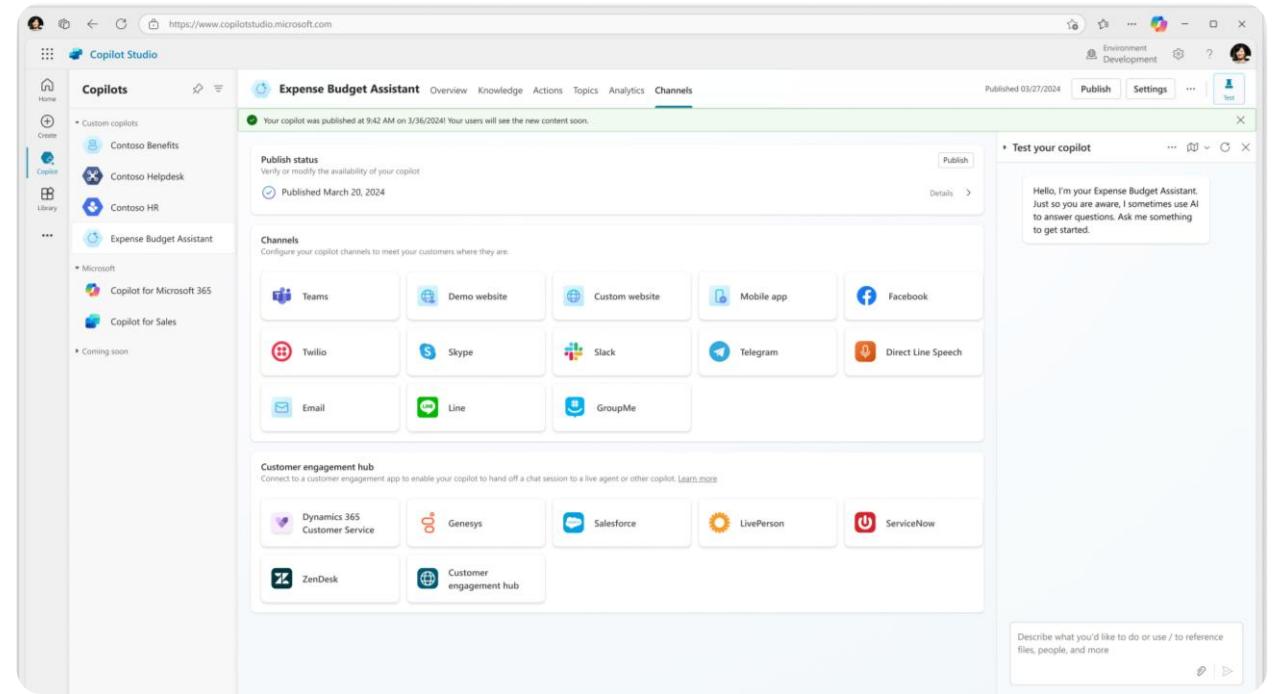
Mix generative responses with step-by-step topics for complete control. Create actions, plugins and connect to your backend systems with 1000s of pre-built connectors



Build & Publish

Publish and go live instantly

Publish and deploy to the channel of choice with a single click, and your agent is live.





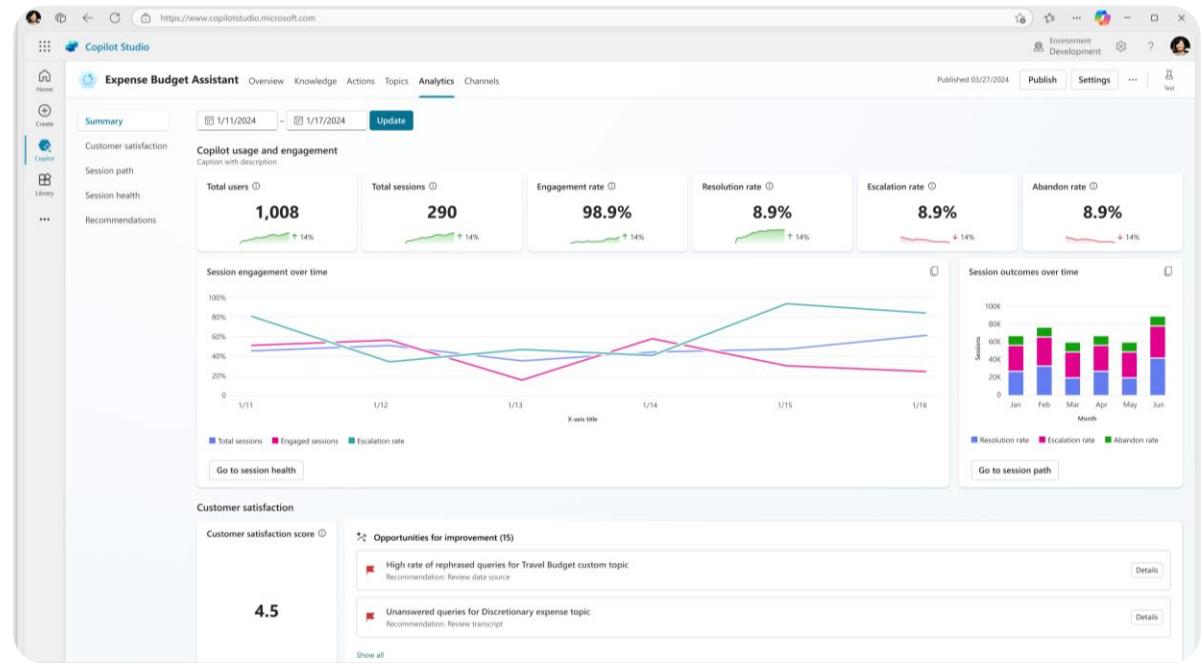
"Using Copilot Studio and Azure Open AI Services as tools to improve our building permit application process supports work the City of Kelowna is doing to address the housing crisis by delivering more homes, faster."

- John Brenan, Director of IT for City of Kelowna

Analyze & Improve

Monitor and get insights

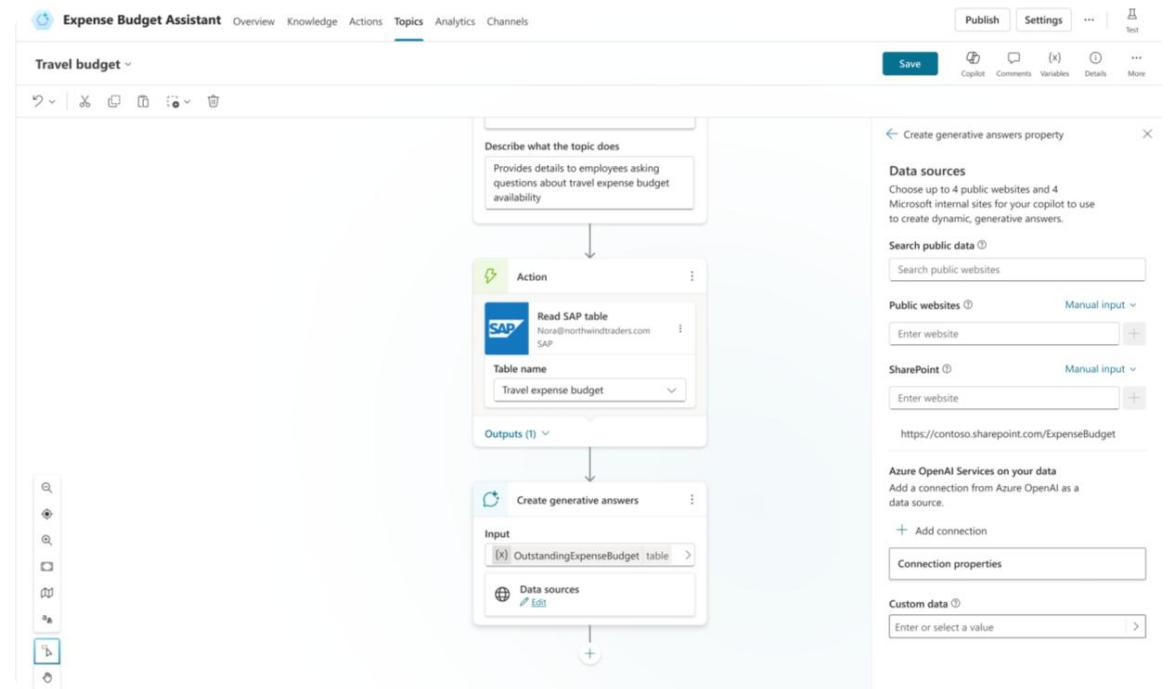
Understand what's working well and what needs to improve with conversational analytics



Analyze & Improve

Fine tune to add

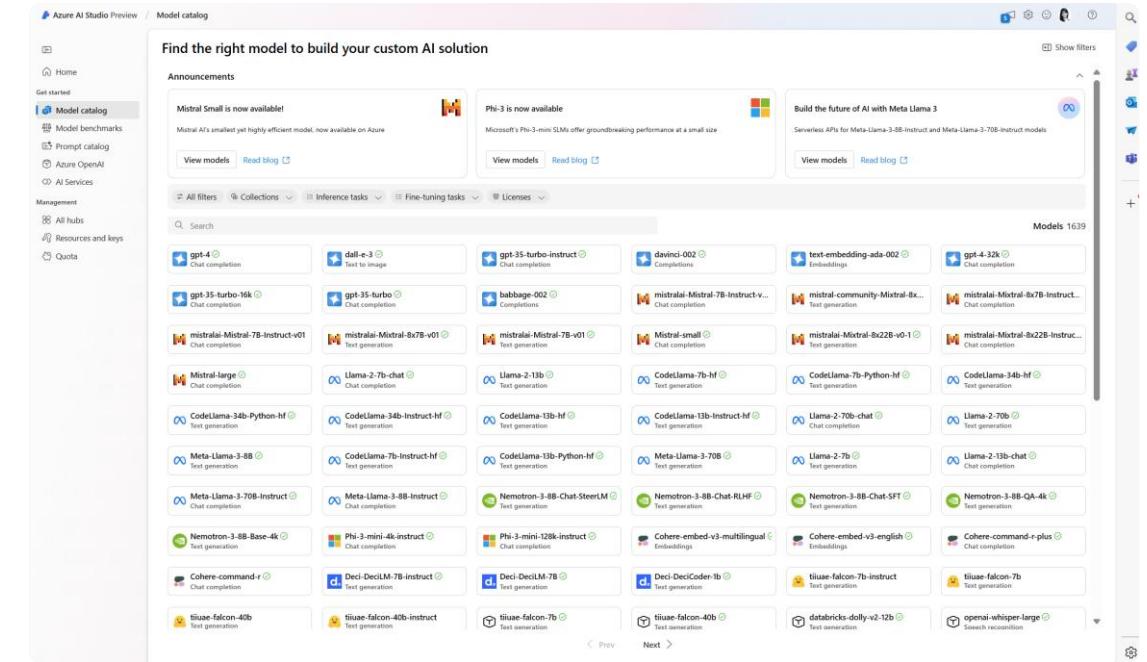
Layer in more topics with custom responses and conditions based on insights generated to improve your agent's performance.



Analyze & Improve

Add Conversational Services

Integrate with Azure AI Studio, Azure Cognitive Services, Bot Framework and a variety of other Microsoft conversational services



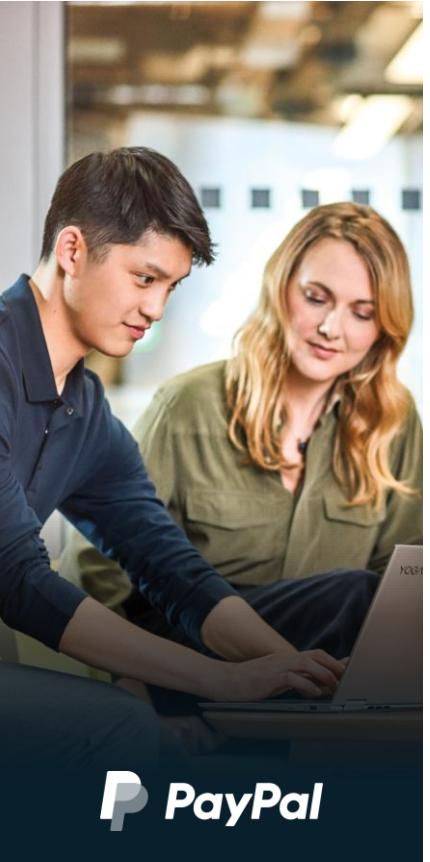
More than 36,000 customers across every industry have used Copilot Studio

to help improve performance and efficiency while reducing costs and risks



Rabobank

Conversational banking
copilot on both telephony
and digital channels



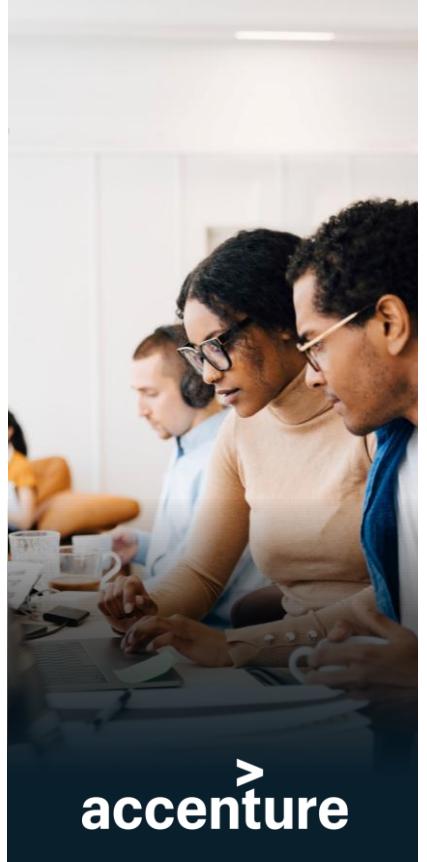
PayPal

HR/IT copilot for employees
that reduced support costs
and workload



Holland America Line

Helping customers find and
book the perfect cruise



accenture

Creating customer focused
copilots as a Microsoft Partner



hp

Customer copilot to help find
the right products and support



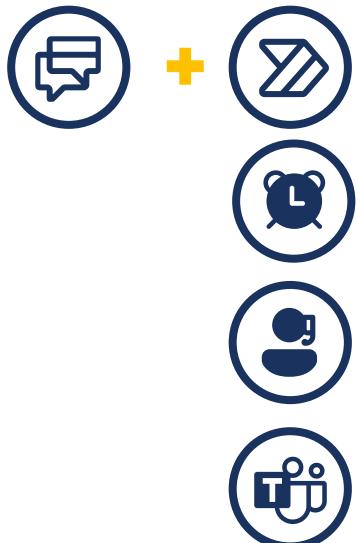
CINEPLEX

Copilot that helps with
customer service for guests

Meet Peggy Bot



Chatbot Assistant for Help Desk Requests



25%-40% of demand can be fulfilled by AI Chatbots and RPA

Significantly **reduce wait times** and length of calls needing an agent

Significant agent **workload deflection**, providing sizeable **labor savings** and **improved service level**

Available on mobile devices using the Teams App

6,544 hours

saved annually via **Copilot Studio + Power Automate**



Support for General Help Desk Requests

4856hrs saved annually

saved annually via [Copilot Studio + Teams](#)

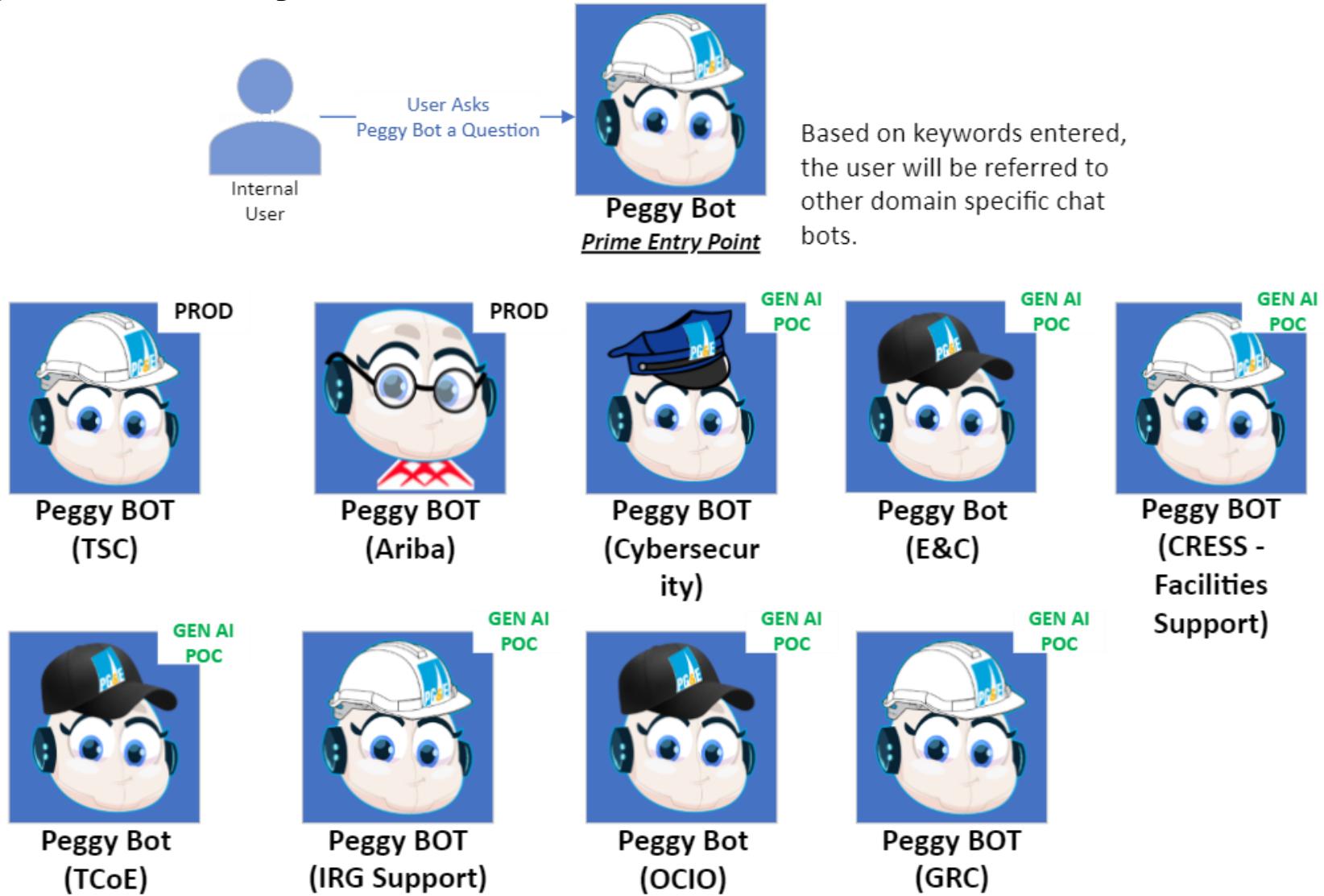


SAP Account Unlock Procedure

840hrs saved annually

saved annually via [Copilot Studio + Power Automate](#)

Peggy's Family Tree



1.3k

Advanced
Digital Creators



3k

Trained Citizen
Developers

\$75m

Annualized
Savings

Enable everyone to solve problems and innovate

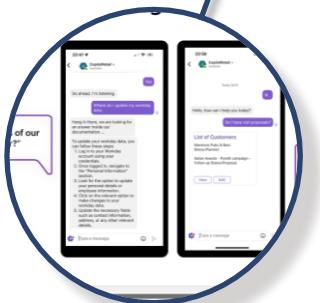
Microsoft Copilot Studio empowers **every end user**



Business to Business
Create workflows in half the time

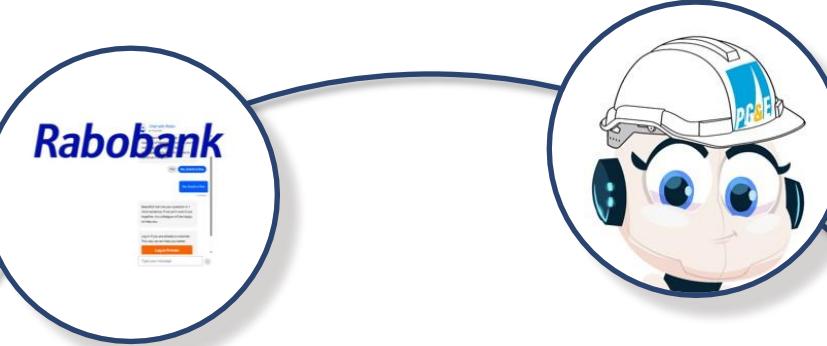


Front Line Worker
Right information at their fingertips



Customer service
45% of customer issues addressed by digital assistant

Rabobank

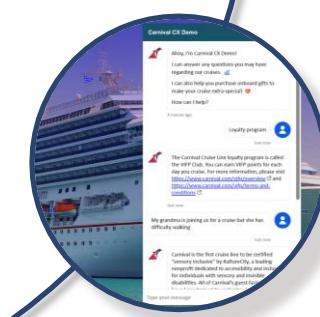


Business to Employee
Employee agents that act as personal assistants



Autonomous Agents

Personal agents that connect to backend systems with 1400+ connectors



Business to Consumer
Copilot Studio Concierge Experience

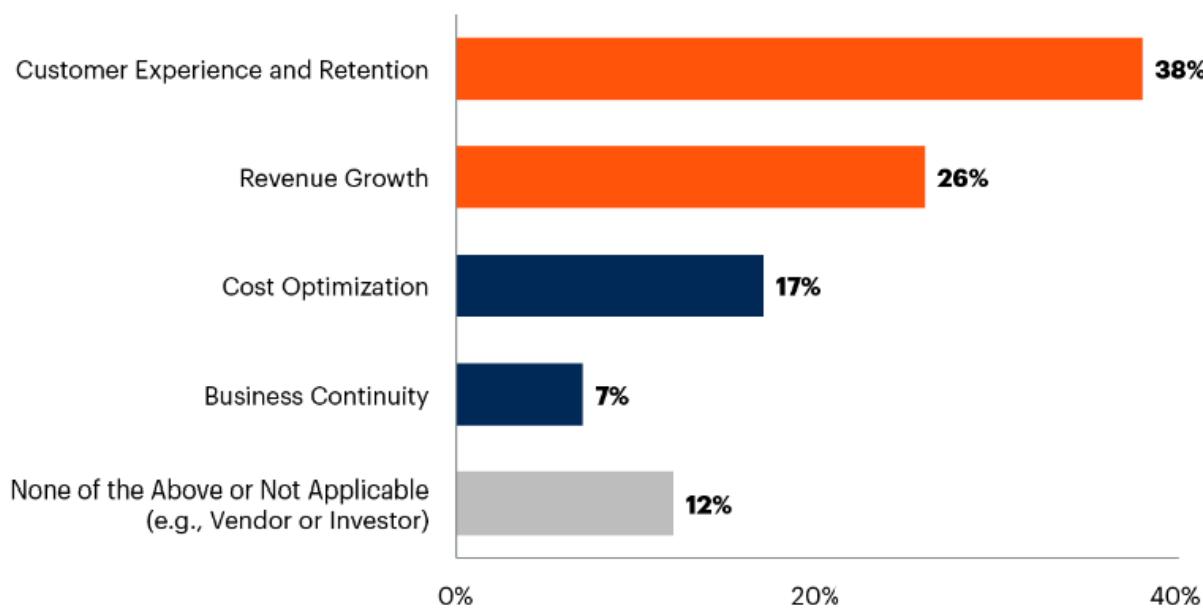


Government to Constituent
Improving the experience and collaboration

"Smoother encounters with your company is the goal"

Primary Focus of Generative AI Initiatives

Percentage of Respondents



Source: 2023 Gartner Beyond the Hype: Enterprise Impact of ChatGPT and Generative AI Webinar Polls

Note: Results of these polls should not be taken to represent all executives as the survey responses come from a population that had expressed interest in AI by attending a Gartner webinar on the subject.

795740_C

Enhance value for customers

Reduce customer effort



Rabobank

50%

Of customers who contacted Rabobank via bot had a fully automated experience

How do you Get Started & Bend the Curve of Innovation



Resources to get a fast start

Copilot Studio In a day

Copilot Studio IAD [Self Guided Microsoft Learning: Create copilots with Microsoft Copilot Studio Online Workshop](#)

Try it out at aka.ms/trycopilotstudio

See a demonstration <https://aka.ms/copilotstudiodemo>

Join the Community <https://aka.ms/copilotstudiocommunity>

Hear from Dewain Robinson, [The Copilot Studio Dude](#)

Assess

- Pre-Engagement Questionnaire
- Pre-Engagement Questionnaire Review



Build the Vision

- Build the Vision Kick-Off
- Copilot Studio Overview
- Selected Optional Modules
- Build the Vision



Plan for Value

- Plan the Value Kick-Off
- Plan for Value
- Report and Recommendations

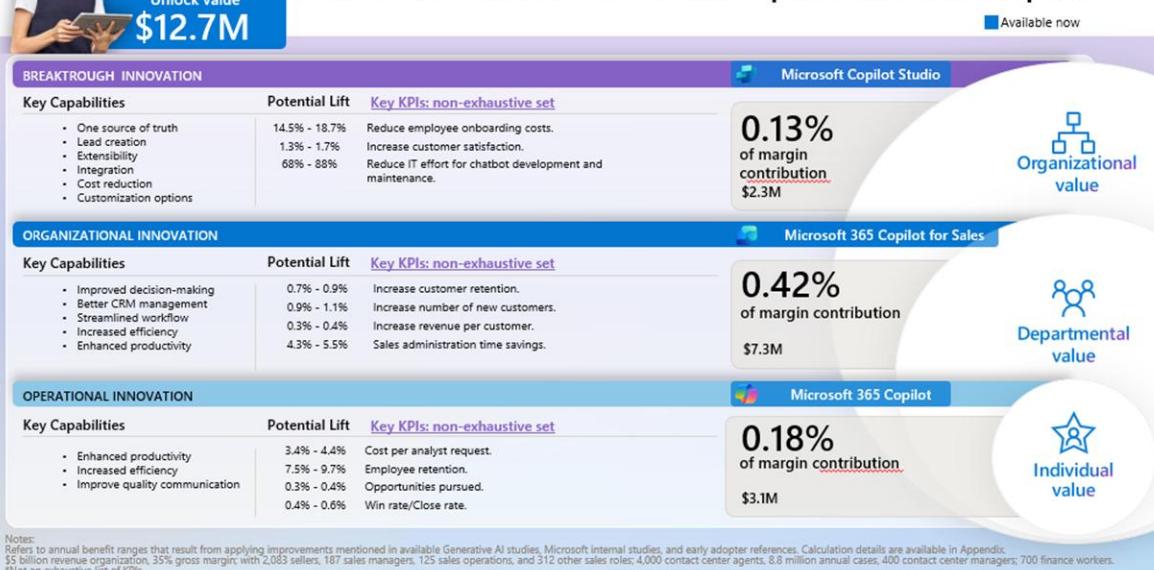
Copilot Studio Value Discovery Wkshop

Resources to showcase value and drive results fast

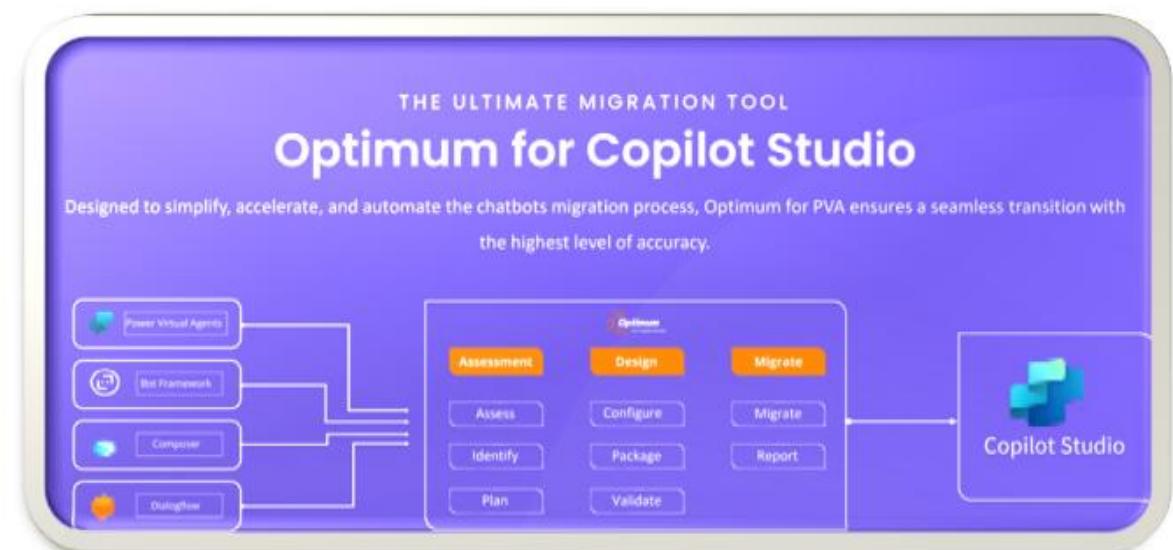
Business Value Assessment



Sales Persona: Microsoft AI and Copilot innovation impact



Copilot Studio Migration Program



**For additional information
and the assets mentioned in
this session visit this QR code**



**The best way to predict the future is to
invent it**



Thank you





Autonomous capabilities in Copilot Studio

Complete tasks independently with a copilot tailored to a specific roles or functions

Automates long-running processes

Reasons over actions and user inputs

Leverages memory and knowledge

Learns and improves

Follows human guardrails and asks for help

The screenshot shows the Copilot Studio interface for an 'IT Helpdesk' agent. On the left, a sidebar lists 'Copilot Studio' sections: Home, Create, Library, and The main area has tabs for Overview, Knowledge, History, and Analytics, with 'Overview' selected. A central callout box says 'Your copilot is ready! Here's what's next:' with steps: Add instructions, Add actions, Test your copilot, and Publish your copilot. Below this is an 'Overview' section with a 'Goal' card: 'Assist users through new hire support, troubleshooting, and hardware procurement.' To the right, there are sections for 'Channels' (Outlook, Teams, Microsoft Copilot), 'Instructions' (a bulleted list of tasks), 'Triggers' (New Hire Detection, Employee hardware refresh), 'Actions' (Send email request, Create record), and a 'Test your copilot' panel. The test panel shows a message from 'sarahperez@microsoft.com' and options to run a simulated or real-world test.