

Lab Guide – Customer Feedback Analysis

SharePoint-centric Copilot Agent

1 | Scenario Summary

A retail chain receives hundreds of customer comments per week across physical stores and online forms. A Copilot agent will auto-label sentiment & topic, escalate urgent issues, and produce weekly insight reports—all inside Microsoft 365.

2 | Learning Objectives

1. Configure SharePoint lists for feedback ingestion.
2. Use AI Builder / Azure Cognitive Services for sentiment & category prediction.
3. Build a Copilot agent that enriches feedback items and routes tasks.
4. Create **Power Automate** flows for escalations, weekly digest and ageing alerts.
5. Surface insights in e-mail and Teams.

3 | Prerequisites

- SharePoint Online site with *Feedback* list created.
- Text Analytics resource or Power Platform AI Builder licence.
- Teams channels for *Customer Service* and *Facilities*.
- Access to Power Automate and Copilot Studio.

## 4	SharePoint Schema	
List	Key Columns	Notes
Feedback Submissions	ID (Auto), CustomerName, StoreID (Lookup), SubmissionDate, Rating (1-5), FeedbackText, AttachmentLink, PredictedCategory, Sentiment, AI_Summary, AssignedTo, Status	Core feedback store
Store Directory	StoreID, StoreName, Region, Manager	Lookup target

Choice columns

Sentiment: Positive | Neutral | Negative Status: New | Escalated | In Review | Resolved

5 | Lab Exercises

EX 1 – Data Intake

1. Import sample .csv with 30 historical feedback rows.
2. Attach 3 sample photos to demonstrate AttachmentLink behaviour.

EX 2 – AI Prediction Flow

1. Create Instant Cloud Flow → When an item is created (**Feedback Submissions**).
2. Add **AI Builder–Predict Sentiment** → map *FeedbackText*.
3. Add **AI Builder–Category Classification** → custom model with five categories.
4. Write results back to **PredictedCategory**, **Sentiment** and **AI_Summary**.
5. Condition: if *Sentiment*=*Negative* AND *Rating*≤2 → set *Status*=*Escalated* and *AssignedTo*=*Customer Service*.

EX 3 – Copilot Enrichment Topic

1. Topic trigger: "Summarise feedback {ID}".
2. Steps:
 - o Retrieve SharePoint item by ID.
 - o Respond with adaptive card containing sentiment icon, summary, attachment preview and quick links *Assign*, *Resolve*, *Escalate*.

EX 4 – Escalation Alerts

Flow	Trigger	Actions
Urgent Feedback	When item modified where Status=Escalated	Post to #customer-service-escalations with 🚨 emoji and deep link.
Facilities Routing	Condition inside AI flow – <i>PredictedCategory</i> = <i>Store Cleanliness</i>	Set <i>AssignedTo</i> = <i>Facilities</i> and post card to #facilities-alerts.

EX 5 – Weekly Insight Report

1. Scheduled Flow (Mon 06:00).
2. Get items where *SubmissionDate* LastWeek → group by **Sentiment / PredictedCategory**.
3. Compose Markdown table → pass to **Draft with Copilot** for narrative.
4. Send e-mail to Retail Ops leadership with top 5 negative excerpts and trend arrows.

EX 6 – Ageing Monitor

1. Recurrence flow (Daily 15:00).
2. Query items where *Status=Escalated* and *Modified < Today-2* → Teams mention to *AssignedTo*.

6 | Testing Checklist

- Submit new feedback with low rating → confirm AI assigns *Negative* & escalates.
- Verify Teams alert card content matches SharePoint data.
- Confirm Weekly Insight e-mail summarises correct counts.

7 | Stretch Goals

- Add **Power BI** sentiment trend visual embedded in SharePoint.
- Train multi-label classifier to pick two categories per comment.
- Auto-translate foreign-language feedback before analysis.