

Create a Monthly Business Review (MBR) Agent

This guide provides step-by-step instructions for creating an MBR (Monthly Business Review) Agent, which is designed to streamline the preparation process for MBRs. By following the guide, users will learn how to query resources and obtain quick answers, ultimately enhancing efficiency and organization for business reviews. It's a valuable tool for anyone looking to optimize their workflow and ensure they are well-prepared for important business discussions.

Lab Details

Level	Persona	Duration	Purpose
100	Maker/Developer	20 minutes	After completing this lab, participants will be able to create a conversational agent hosted in SharePoint. You'll learn how to add knowledge sources, test and publish to SharePoint.

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Why This Matters

Managers and Team Leads – Drowning in slide decks, scattered data, and last-minute scramble sessions before Monthly Business Reviews?

Think of a traditional MBR prep process:

- **Without agents:** Leaders dig through dozens of decks, copy/paste insights, manually summarize risks and themes, and chase down team updates – all while trying to spot patterns across silos
- **With agents:** AI reads files from SharePoint, extracts key themes (like at-risk deals or blockers), and delivers concise summaries you can act on – no digging required

Common challenges solved by this lab: - “We waste hours each month trying to consolidate MBR decks from every team” - “Leadership misses key risks or repetitive asks buried in

PowerPoint files” - “It’s hard to spot trends across different teams without a data analyst” - “We’re reactive instead of proactive when it comes to business risks”

In just 20 minutes, you’ll learn how to build an agent that helps leaders get to the “so what” faster—turning static decks into actionable insights.

Introduction

Monthly Business Reviews (MBRs) are critical for keeping leadership informed, identifying risks, and aligning on key initiatives. But the preparation process is often tedious and fragmented, requiring hours of manual effort to gather, review, and summarize insights from multiple teams.

Real-world example: A regional sales org prepares for its MBR by collecting slide decks from over 10 team leads. Each deck includes updates, at-risk deals, and escalations—buried across inconsistent formats and file names. A single director spends 4–6 hours manually scanning each one, summarizing recurring themes, and building a master summary for leadership.

After implementing an agent, the director simply prompts the system to scan the latest MBR files in SharePoint. Within seconds, the agent highlights common risks, summarizes recurring asks, and surfaces trends across teams. Now the director can focus on strategic insights—not file wrangling.

Core Concepts Overview

Concept	Why it matters
Conversational Agent	Powers natural, chat-like interactions so users can ask about MBR themes, risks, and takeaways without needing to dig through files manually
Knowledge	Enables the agent to read and understand content from past MBR decks stored in SharePoint, so it can extract relevant insights and patterns
Testing in Copilot Studio	Helps you validate that the agent understands user intent and returns accurate, useful responses before it's shared with others
Publishing to SharePoint	Makes the agent accessible to your team directly from a SharePoint site, so anyone preparing for an MBR can use it on demand
SharePoint Agent Setup	Seamlessly integrates with your existing file storage so your agent always has access to the latest MBR decks—no need to move files around

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Summary of Targets

In this lab, you'll build a conversational MBR agent that streamlines how managers and leaders access insights across Monthly Business Review decks. By the end of the lab, you will:

- Create and configure a conversational agent using Copilot Studio
- Add knowledge sources by linking SharePoint-stored MBR files to the agent
- Test the agent to ensure it can accurately summarize risks, trends, and key themes
- Publish the agent to a SharePoint site so it's easily accessible to stakeholders
- Enable your team to ask questions like "What are the common risks this month?" and get immediate, actionable answers

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Instructions by Use Case

Use Case #1: Create SharePoint site and upload MBR documents

Set up a dedicated SharePoint site with MBR documents that will serve as the knowledge source for your agent.

Use case	Value added	Estimated effort
Create SharePoint site and upload MBR documents	Establish centralized document repository for MBR data that the agent can access	10 minutes

Summary of tasks

In this section, you'll create a SharePoint team site and upload sample MBR documents that will serve as the knowledge base for your agent.

Scenario: Your organization needs a centralized location for Monthly Business Review documents that can be easily accessed by an AI agent to provide instant insights and summaries.

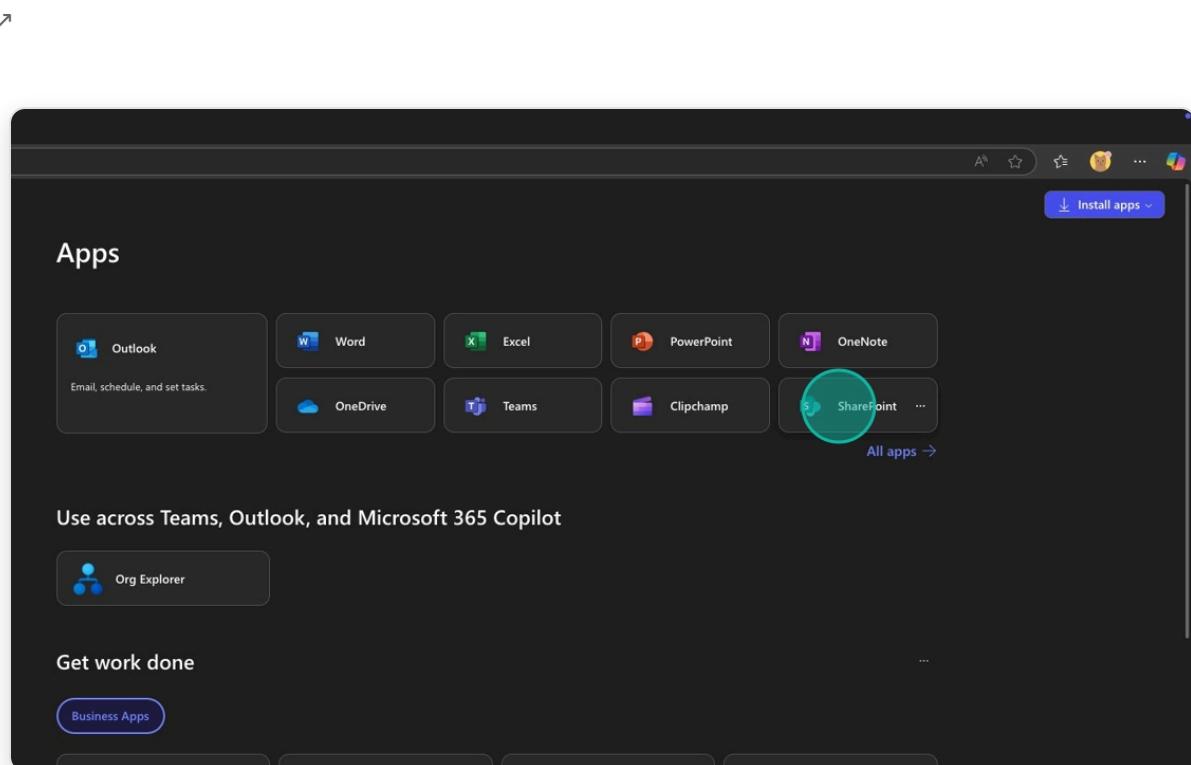
Objective

Create a SharePoint site with MBR documents that will serve as the knowledge source for your conversational agent.

Step-by-step instructions

Create SharePoint site

1. Go to m365.cloud.microsoft/apps/ and select **SharePoint** ↗



[SharePoint](#)

2. Select **Create Site**

The screenshot shows the SharePoint homepage. On the left, there's a navigation bar with icons for Home, Following, Recent, and a search bar labeled 'Search in SharePoint'. In the center, there's a large promotional image for SharePoint pages with the text 'Create, share, and track your pages from one single place' and a 'Go to pages' button. At the top left of the main content area, there's a red box highlighting the '+ Create site' button.

Create Site

3. Select Team Site

The screenshot shows a modal dialog titled 'Create a site: Select the site type'. It asks the user to select the type of site they want to create, with links to 'Learn more about team sites' or 'learn more about communication sites'. The dialog is divided into two sections: 'Team site' (highlighted with a red box) and 'Communication site'. Each section contains an illustration and a list of features.

Team site

Create a private space to collaborate with your team.

- Track and stay updated on project status
- Share team resources and co-author content
- All site owners and members publish site content
- Can connect to other Microsoft 365 products

Communication site

Share information that engages a broad audience.

- Create a portal or subject-focused site
- Engage dozens or thousands of viewers
- Few content authors and many site visitors

Team Site

4. Select Standard team

Select a template

From Microsoft From your organization

The screenshot shows a grid of eight template cards. The first card, 'Standard team', is highlighted with a red border. Other cards include 'Crisis communication team', 'Employee onboarding team', 'Event planning', and several others like 'Project management' and 'Virtual event'. A note at the bottom says 'You can change the site template later under Settings.'

Standard team
Manage projects, share content, and stay connected with your team.

Crisis communication team
Centralize crisis communication, resources, and best practices.

Employee onboarding team
Guide new employees through your team's onboarding process.

Event planning
Coordinate and plan event details with your team.

You can change the site template later under Settings.

Back

Standard Team

5. Select Use Template

Preview and use 'Standard team' template

From Microsoft

The screenshot shows the 'Standard Team' template preview. It includes sections for 'Site capabilities' (View recent team activity, Share team news, Highlight team content and resources), 'What's included' (1 home page, Preview site), and a main preview area. The preview area shows a 'News' section with a message from 'Patti Fernandez' and an 'Activity' section showing a thumbnail for 'SitePages Home'. A note at the bottom says 'Existing pages, libraries, and lists can still be accessed in Site contents. Any content added by a template can be edited or deleted later.' A 'Use template' button is highlighted with a red border.

Site capabilities

- View recent team activity
- Share team news
- Highlight team content and resources

What's included

1 home page

Preview site

Existing pages, libraries, and lists can still be accessed in Site contents. Any content added by a template can be edited or deleted later. [Learn more](#)

Standard Team

News

Activity

Documents

Quick links

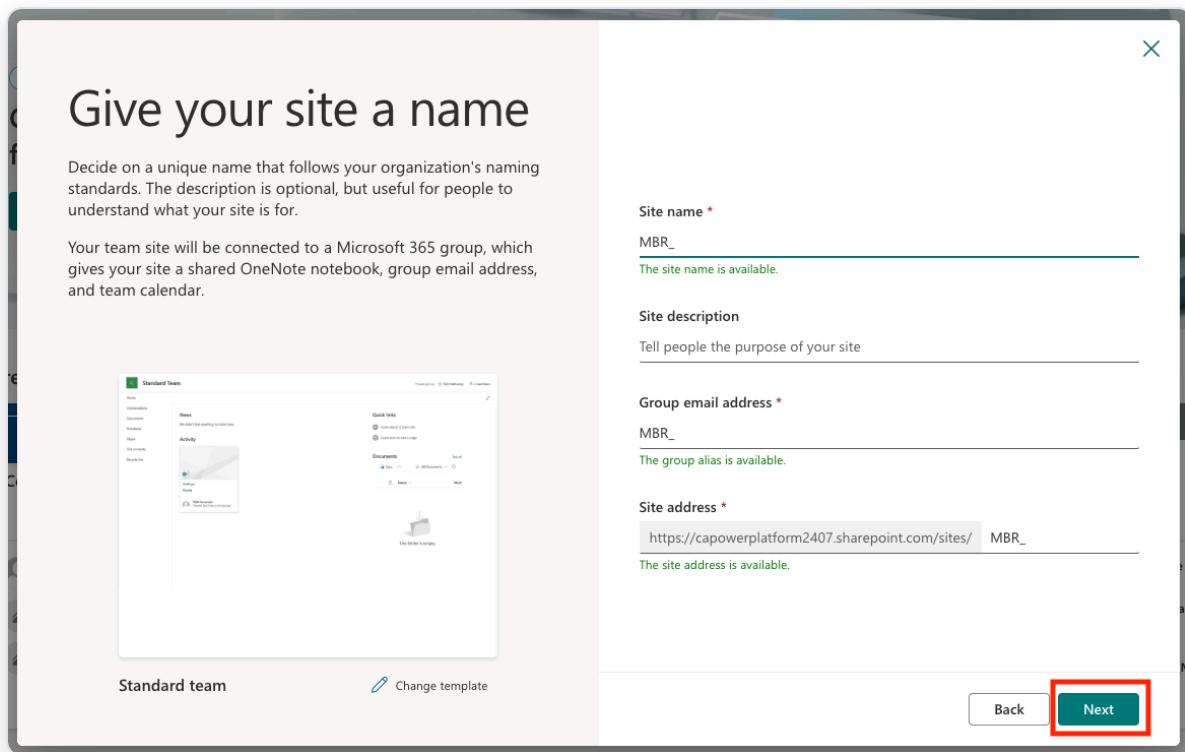
Documents

This folder is empty

Back Use template

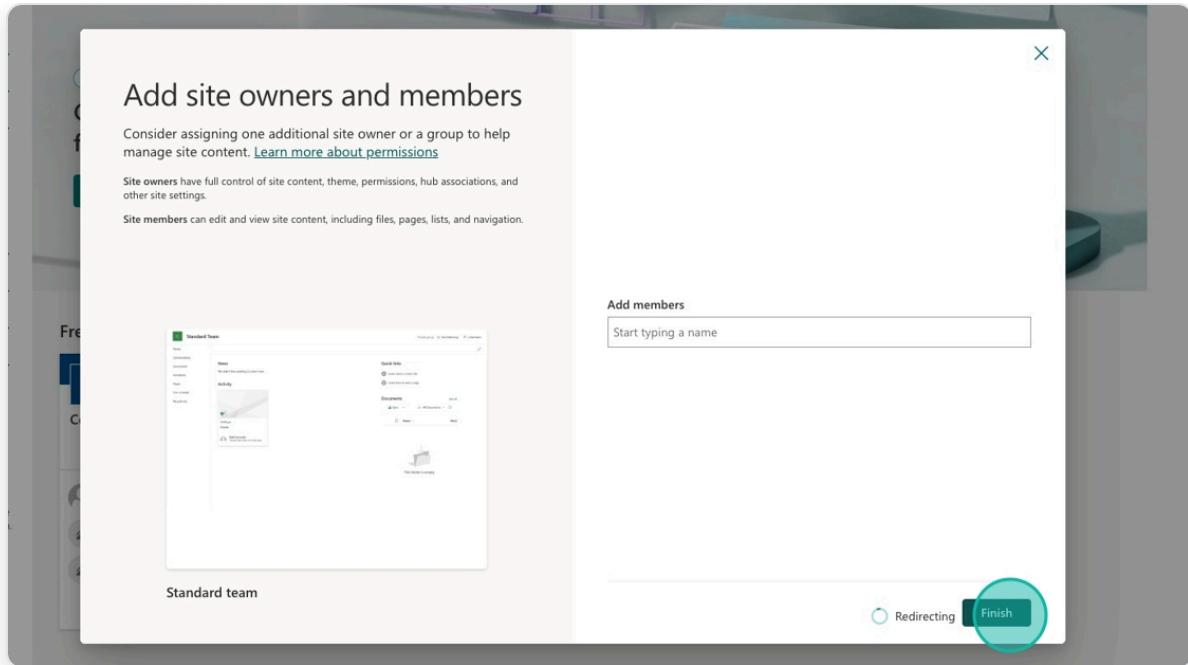
Use Template

6. Put **MBR - <Your User Name>** in the Site Name and Select **Next**



Create Site

7. Click **Finish**



Select Finish



Upload MBR documents



Important:

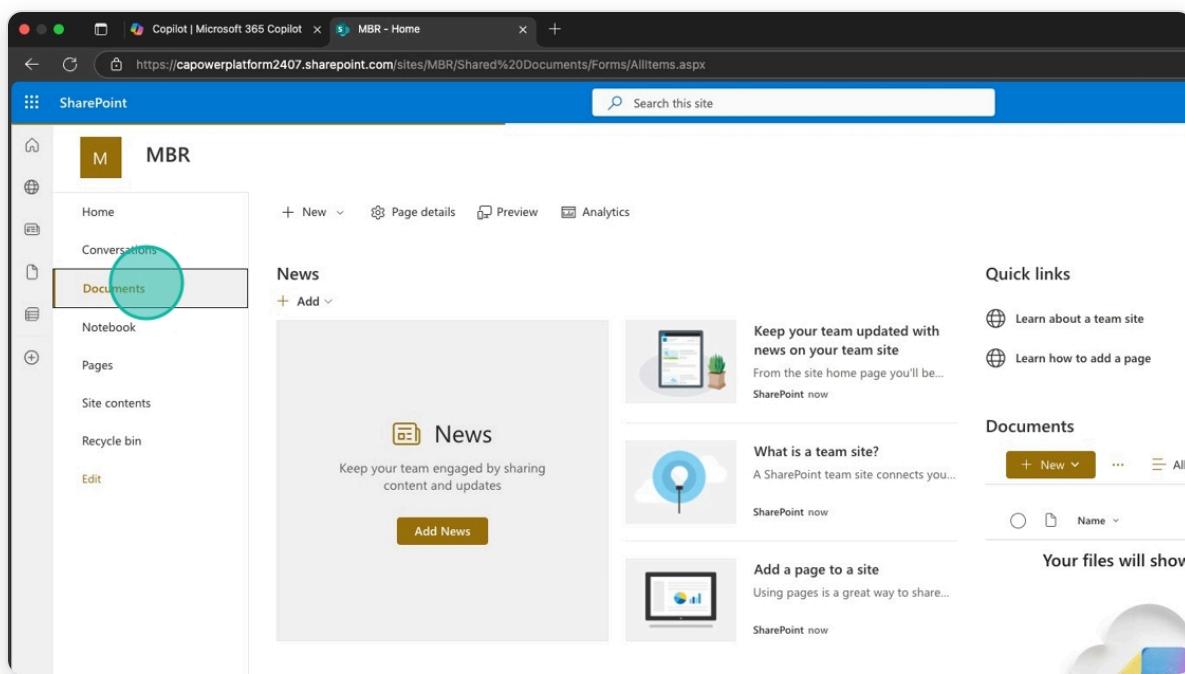
For training participants: If you are following this lab as part of a guided training session, the MBR documents have already been uploaded to SharePoint at the location specified in your **Lab Resources**. You can skip this use case and proceed directly to Use Case #2.



8. ↗

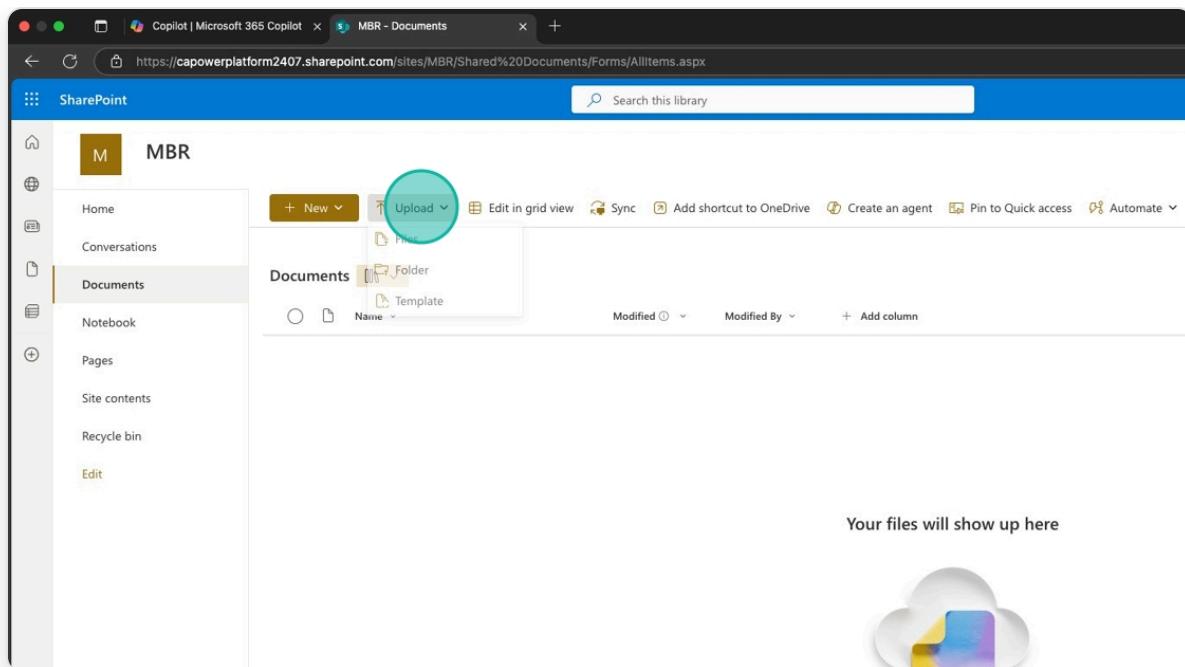
Navigate to the `\sample files` folder and download the sample files

9. Select **Documents** in the left navigation



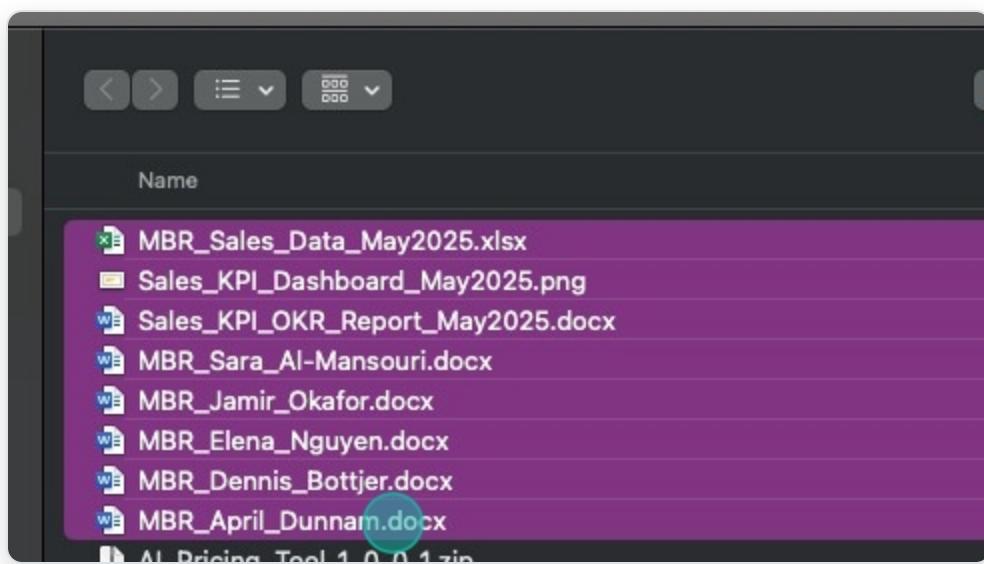
Open Document Library

10. Select **Upload**



Upload Files

11. Select all the sample files you just downloaded and click **Open**



Select Open

Congratulations! You've set up your SharePoint site with MBR documents!

Test your understanding

Key takeaways:

- **Centralized storage** – SharePoint provides a secure, accessible location for business documents
- **Document organization** – Proper file structure enables better agent knowledge extraction
- **Access permissions** – SharePoint security ensures only authorized users can access sensitive MBR data

Challenge: Apply this to your own use case

- What other business review documents could benefit from AI agent analysis?
 - How would you organize files to make them more discoverable by agents?
 - What security considerations are important for your organization's sensitive documents?
-

Use Case #2: Build and deploy MBR agent

Create an intelligent conversational agent that can analyze your MBR documents and provide instant insights.

Use case	Value added	Estimated effort
Build and deploy MBR agent	Create intelligent agent that analyzes MBR documents and provides instant insights	10 minutes

Summary of tasks

In this section, you'll create a Copilot Studio agent, connect it to your SharePoint documents, test its capabilities, and deploy it back to SharePoint for team access.

Scenario: Build an AI assistant that can instantly answer questions about MBR content, identify common risks and themes, and help leadership prepare for business reviews more efficiently.

Objective

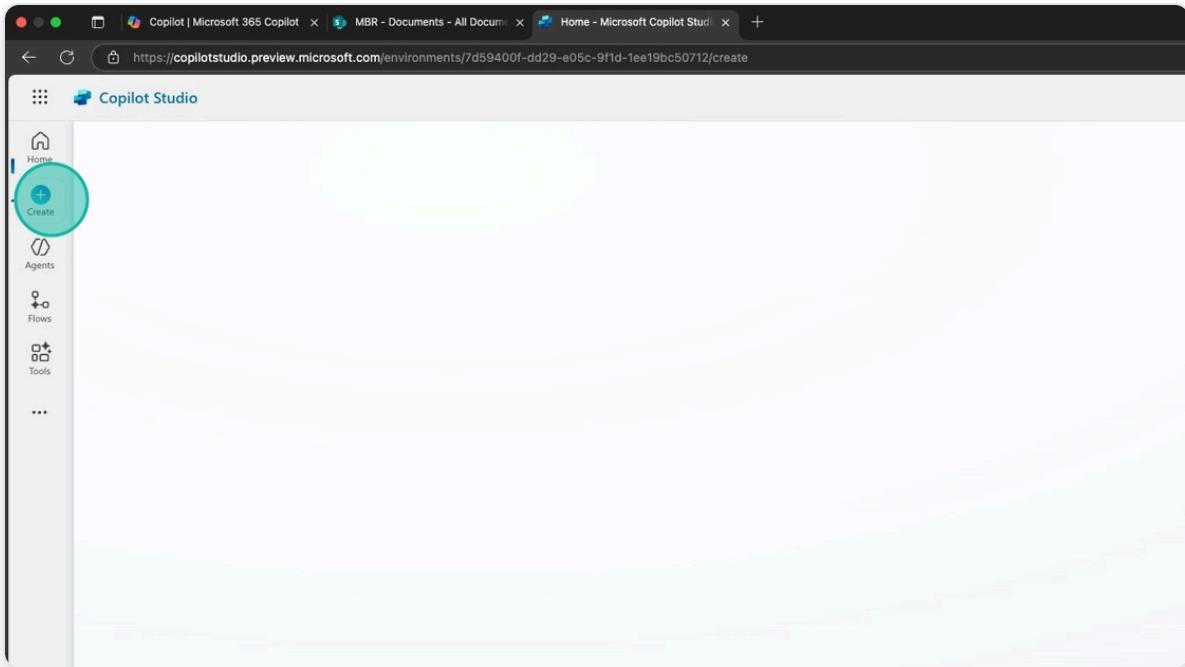
Create, configure, test, and deploy a conversational MBR agent that leverages SharePoint documents as its knowledge source.

Step-by-step instructions

Create the agent in Copilot Studio

1. Open a new browser tab and navigate to copilotstudio.microsoft.com. Select **Create** ↗





Select Create

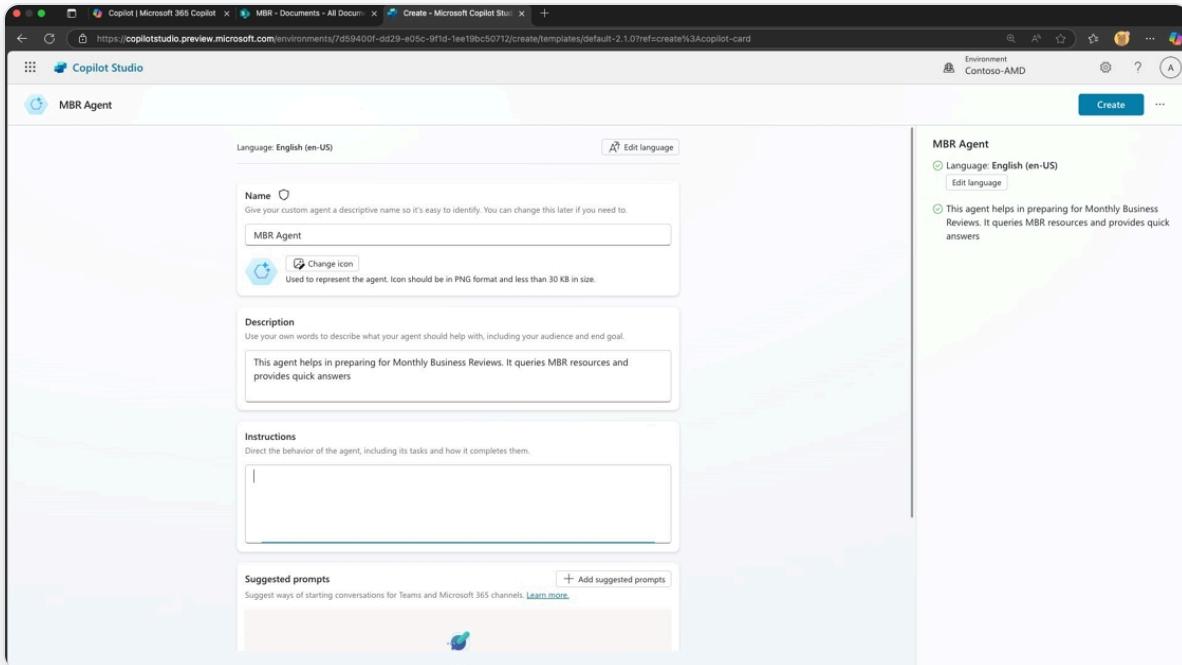
2. Select New agent

A screenshot of the 'Create' screen in Microsoft Copilot Studio. The sidebar shows 'Create' selected. The main area is titled 'Create' and features a large 'New agent!' button with a plus sign, also highlighted with a green oval. Below it, there's a section titled 'Install a managed agent' with icons for 'Document Processor (Preview)', 'Factory Operations (Preview)', 'Factory Safety (Preview)', 'Leave Management', 'Store Operations', and 'Wellness Check (Preview)'. Underneath, there's a section titled 'Start with an agent template' with three options: 'Website Q&A' (Agent template), 'Voice' (Agent template), and 'Safe Travels' (Agent template). Each template has a brief description below its icon.

Select New Agent

3. Select the **Configure** tab

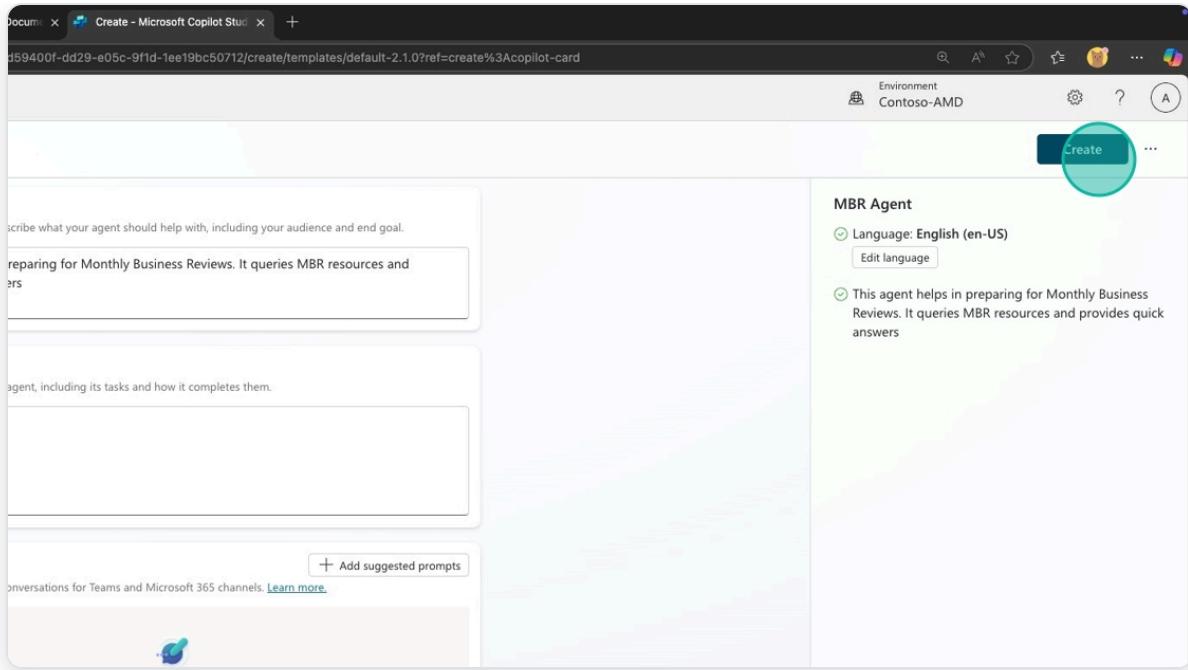
4. In the **Name** field type **MBR Agent**. In the **Description** field type, **This agent helps in preparing for Monthly Business Reviews. It queries MBR resources and provides quick answers**



Fill out Agent Details

5. Select **...** to go into **Edit advanced settings**. Make sure the agent is created as part of one of your **solutions**.

6. Select **Create**



Select Create



Add SharePoint knowledge source

7. Select Add knowledge

The screenshot shows the Microsoft Bot Framework Overview page for the environment 'Contoso-AMD'. The top navigation bar includes links for Knowledge, Tools, Agents, Topics, Activity, Analytics, and Channels, along with Publish and Settings buttons. The main content area features a large input field with a character limit of 0/8000. A teal circle highlights the '+ Add knowledge' button. Below the input field, there's a section for public websites with a 'Disabled' toggle switch. Another section allows users to complete specific tasks with a '+ Add tool' button. A message from the MBR Agent states: 'Hello, I'm MBR Agent, a virtual assistant. Just so you are aware, I...'. The URL in the browser is <https://botframework.com/environments/7d59400f-dd29-e05c-9f1d-1ee19bc50712/bots/c320bbc3-964b-f011-877a-7ced8d223453/overview>.

Select Add Knowledge

8. Select SharePoint

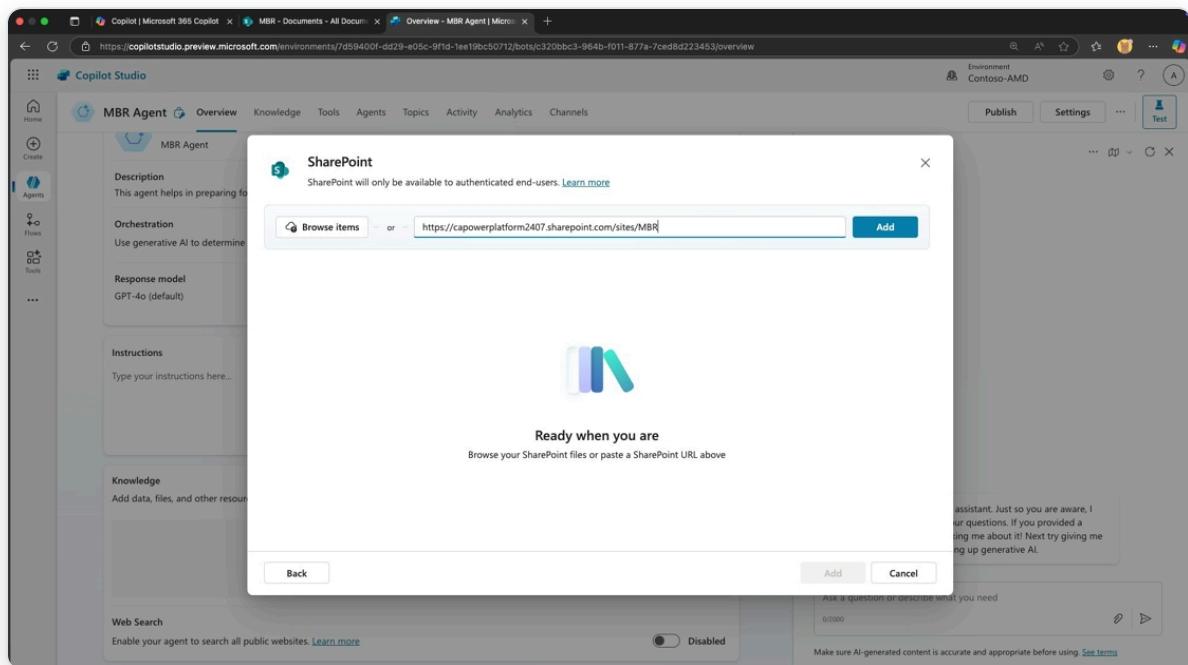
The screenshot shows the 'Add knowledge' dialog box. At the top is a search bar labeled 'Search for a knowledge source'. Below it is a file upload section with a placeholder 'Upload file' and options to 'Drag and drop, or select to browse, or upload and sync from OneDrive or SharePoint'. A note says 'Helps your agent access knowledge from remote file locations.' Below this are several integration options: 'Featured' (selected), 'Advanced', 'Public websites', 'SharePoint' (highlighted with a teal circle), 'Azure AI Search', 'Dataverse', 'Dynamics 365', 'Salesforce', 'ServiceNow', and 'Azure SQL'. To the right is a 'See suggestions' button. At the bottom are 'Cancel' and 'Ask a question or describe what you need' buttons.

Select SharePoint

9. Paste the URL of your SharePoint site folder where the MBR documents are located in the text input

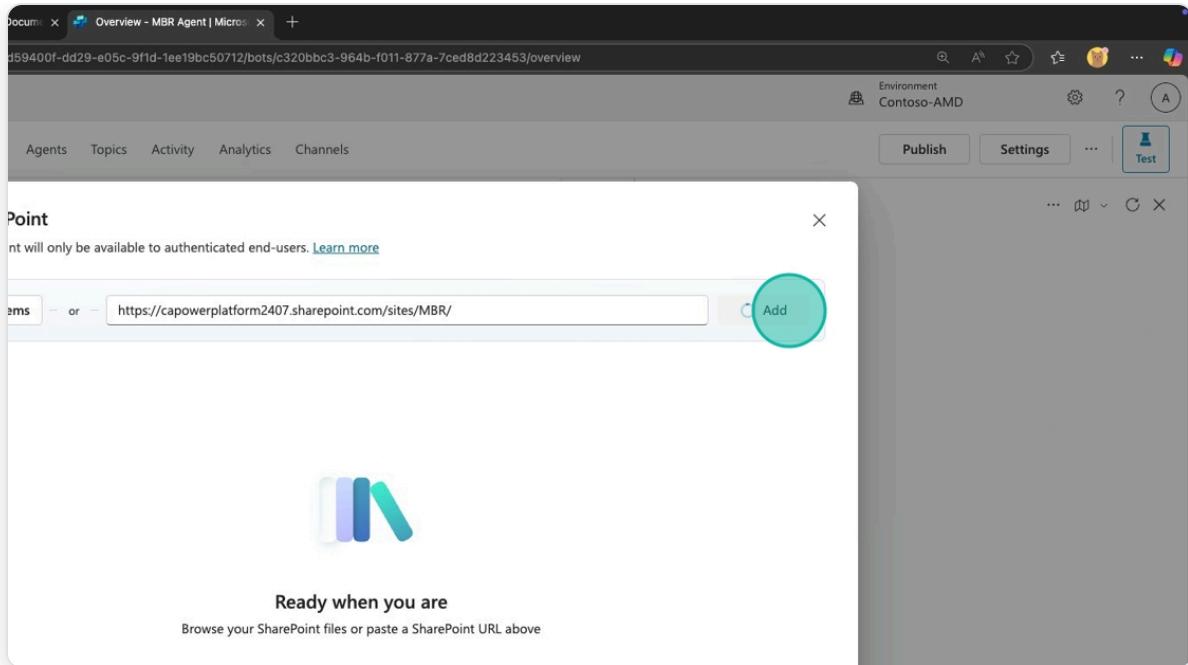
⚠️ Important:

If these files have already been uploaded for you, use the URL provided in **Lab Resources** (specific per training).



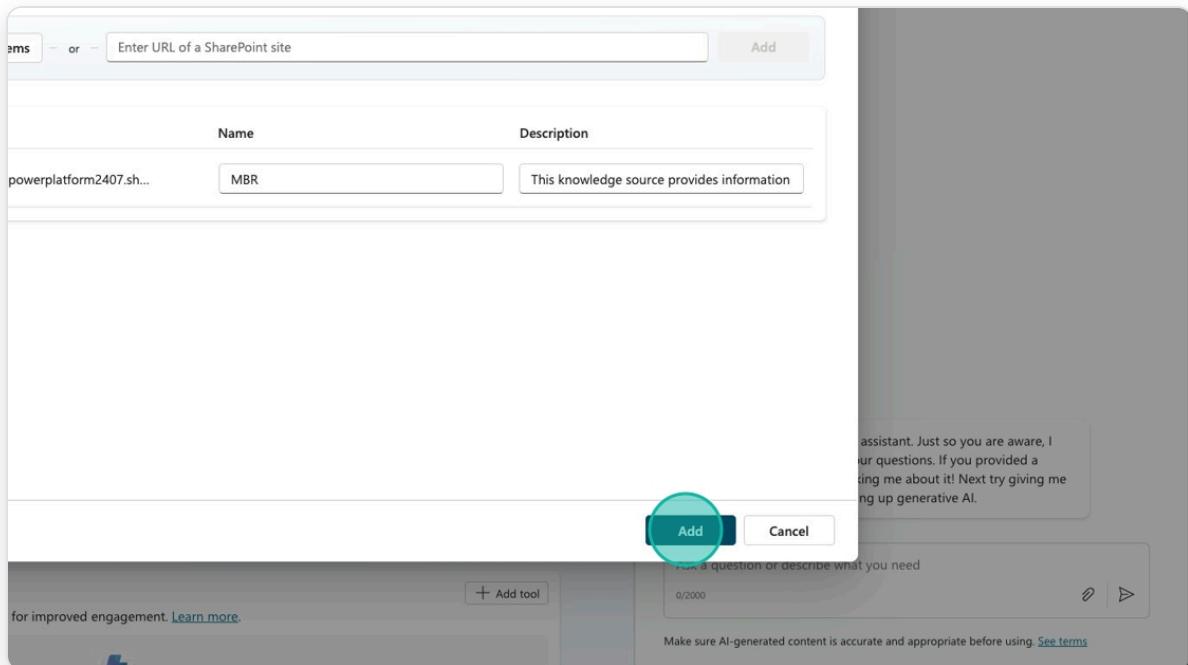
Paste SharePoint URL

10. Select Add



Select Add Knowledge

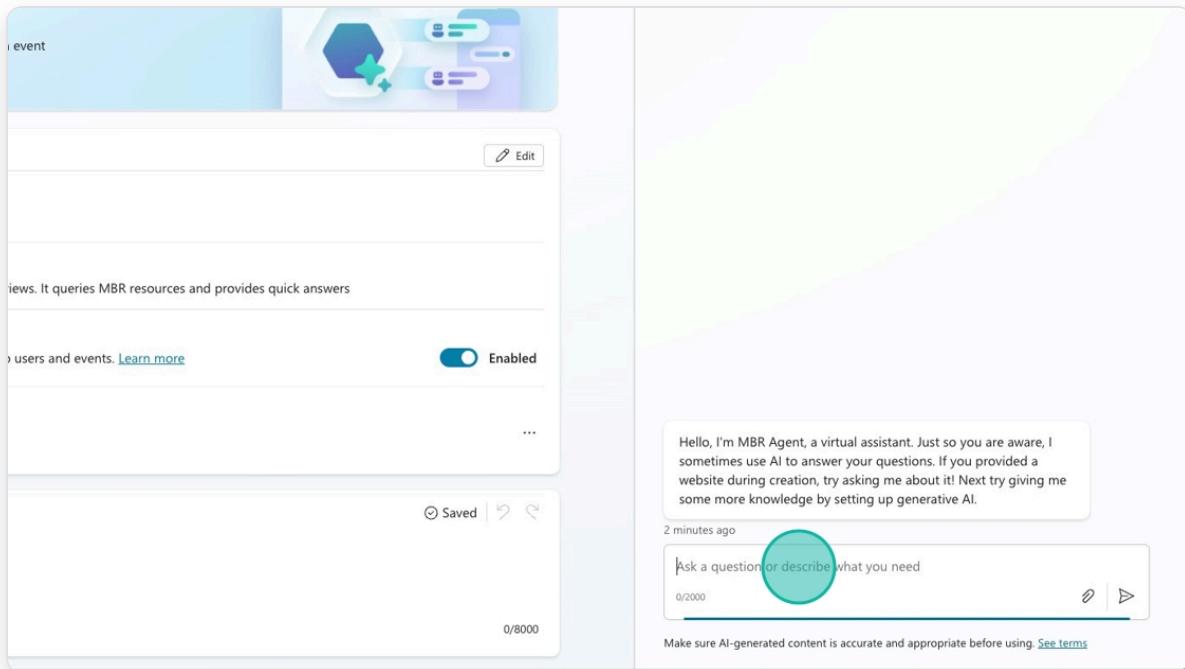
11. Select Add again



Select Add

Test the agent

12. Now we need to test our agent to see if it returns answers from our knowledge.



Test Panel

13. Type **what deals are currently in the negotiation stage?** and send the message.

The screenshot shows the Copilot Studio interface with the 'MBR Agent' tab selected. On the left, there's a sidebar with 'Agents' and other options like 'Create', 'Flows', and 'Tools'. The main area has a heading 'Your agent is ready! Here's what's next:' with three steps: 'Add tools so your agent can do things for you', 'Add trigger so your agent can be activated by an event', and 'Publish your agent so others can use it'. Below this is a 'Details' section for the 'MBR Agent' with fields for Name (MBR Agent), Description (This agent helps in preparing for Monthly Business Reviews. It queries MBR resources and provides quick answers), Orchestration (Enabled), Response model (GPT-4o (default)), and Instructions (Type your instructions here...). To the right is a 'Test your agent' window showing a conversation with the AI agent.

Test the agent

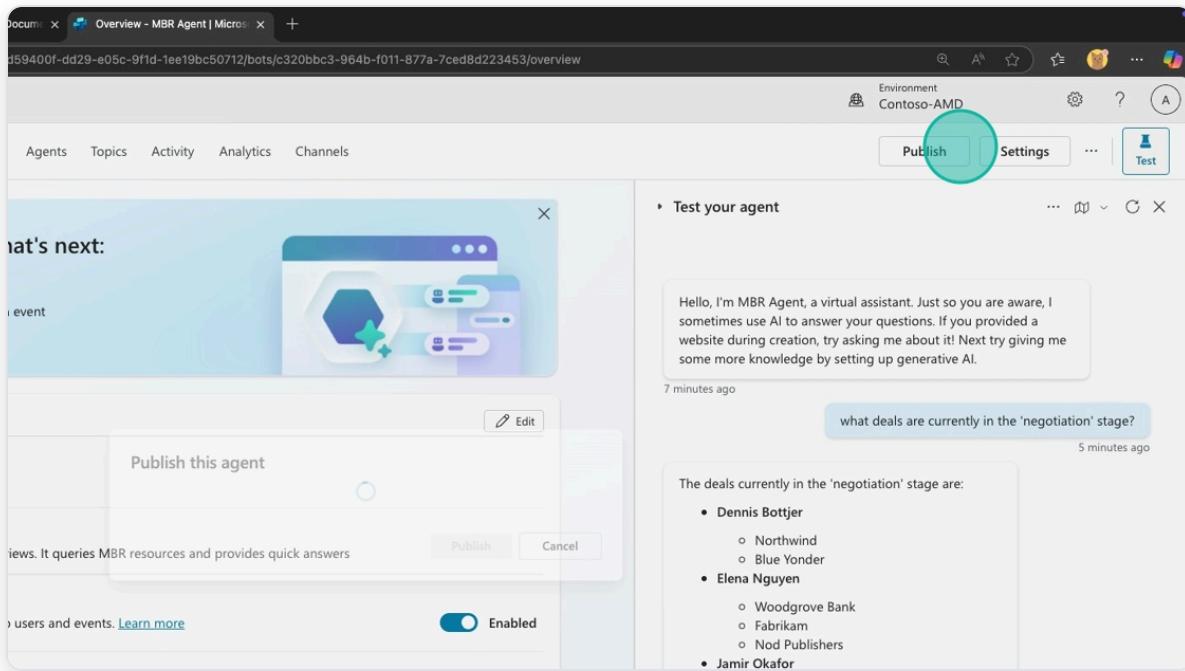
14. Review the answer in the test window and notice the logic in the Activity Pane on the left hand side

The screenshot shows the 'Test your agent' window. A message from the AI says: 'Hello, I'm MBR Agent, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI.' Below this is a message from the user: 'what deals are currently in the 'negotiation' stage?' followed by a response from the AI: 'The deals currently in the 'negotiation' stage are: Dennis Bottjer, Northwind [1], Blue Yonder [1]; Elena Nguyen, Woodgrove Bank [1] ...'. The activity pane on the left shows the query 'deals currently in the 'negotiation' stage' and the resulting response from the AI. At the bottom, there's a note: 'Make sure AI-generated content is accurate and appropriate before using. See terms'.

Review the answer

Publish and deploy to SharePoint

15. Now that we know the agent is working, we need to publish our changes by selecting the **Publish** button in the upper right hand corner.



Select Publish

16. Now it's time to deploy our agent to SharePoint. Select the **Channels** tab.

MBR - Documents - All Document Overview - MBR Agent | Microsoft 365 Copilot

ilotstudio.preview.microsoft.com/environments/7d59400f-dd29-e05c-9f1d-1ee19bc50712/bots/c320bbc3-964b-f011-877a-7ced8d223453/publish

agent Overview Knowledge Tools Agents Topics Activity Analytics Channels

Published 6/17/2025

ur agent is ready! Here's what's next:

- Add tools so your agent can do things for you
- Add trigger so your agent can be activated by an event
- Publish your agent so others can use it

Name: MBR Agent

Description: This agent helps in preparing for Monthly Business Reviews. It queries MBR resources and provides quick answers.

Automation: Generative AI to determine how best to respond to users and events. [Learn more](#)

Enabled: Enabled

Test your agent

Hello, I'm MBR Agent, a virtual assistant sometimes use AI to answer your questi website during creation, try asking me a some more knowledge by setting up ge

8 minutes ago

what deals a

The deals currently in the 'negotiation' s

- Dennis Bottjer
 - Northwind
 - Blue Yonder
- Elena Nguyen
 - Woodgrove Bank
 - Fabrikam
 - Nod Publishers
- Jamir Okafor

Select Channels

17. Select SharePoint

MBR Agent Overview Knowledge Tools Agents Topics Activity Analytics Channels

use you chose Microsoft authentication, only the Teams + Microsoft 365 and SharePoint channel is available. To use other channels, [change your authentication settings](#).

Published agent status

Published by apdunnam (BAM!) 6/17/2025, 11:41 AM

Create a preview Microsoft channels

Demo website Teams and Microsoft 365 Copilot SharePoint

Other channels

Web app Native app Facebook Slack

Telegram Twilio Line GroupMe

Direct Line Speech Email

Test your agent

Hello, I'm MBR Agent, a virtual sometimes use AI to answer your website during creation, try asking me some more knowledge by sett

8 minutes ago

The deals currently in the 'neg'

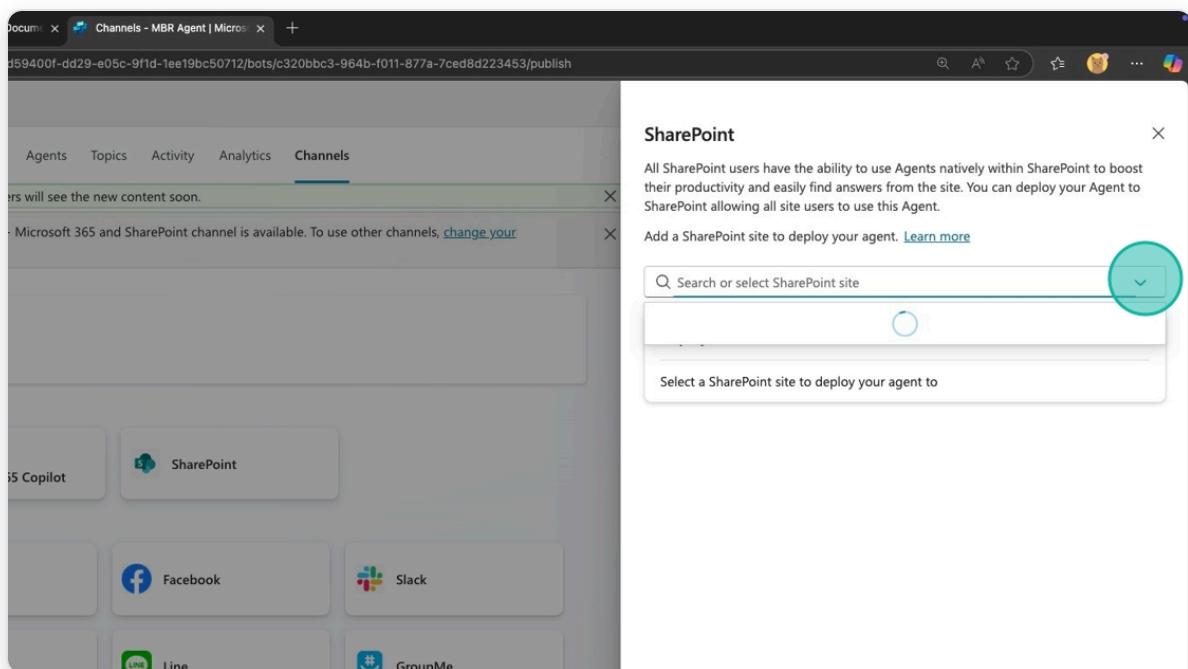
- Dennis Bottjer
 - Northwind
 - Blue Yonder
- Elena Nguyen
 - Woodgrove Bank
 - Fabrikam
 - Nod Publishers
- Jamir Okafor
 - Humongous Insu

These deals are currently in the 1 reference

Select SharePoint

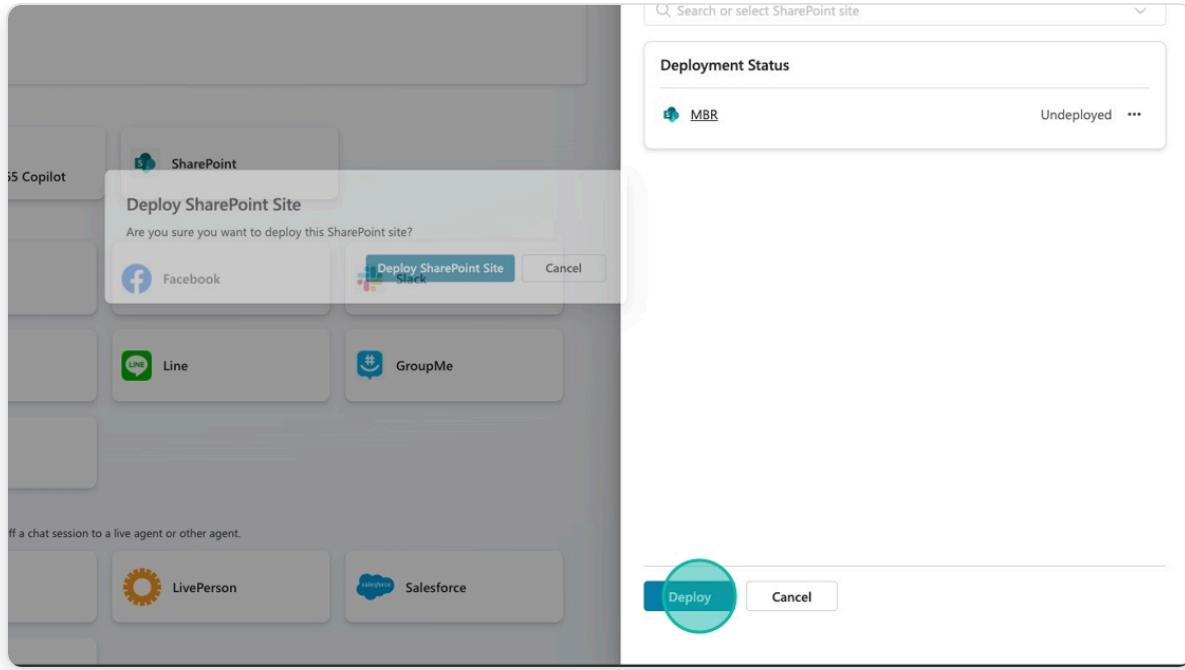
18. Select or search the SharePoint site you created in the previous steps from the list of options

⚠ Important: Only sites where the user has **Edit** permissions can be used. Otherwise, an error will be displayed.



Select the SharePoint Site

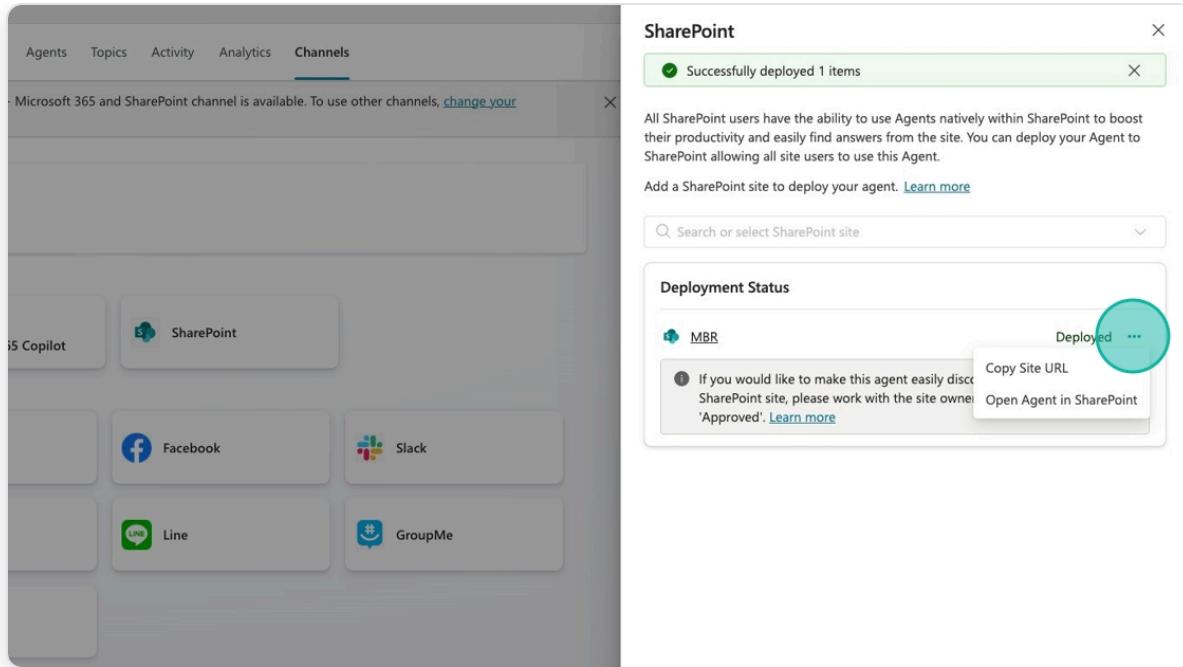
19. Select Deploy



Select Deploy

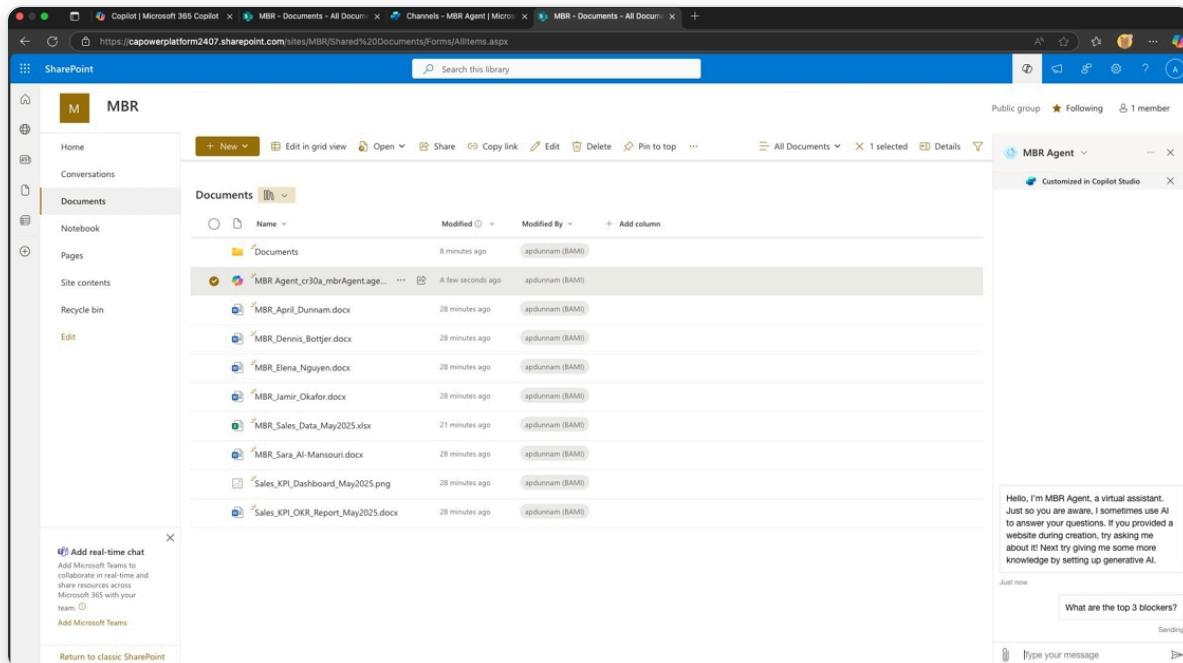
Test the deployed agent

20. Select the next to the Deployed text and select **Copy Agent Url**. Open a new browser tab and paste in the URL.



Select Copy Site URL

21. Your agent will open up in SharePoint. Test it out by typing **What are the top 3 blockers?** in the text input and pressing **Return**



Testing the agent

22. Review the answer and note that it provides links to the referenced documents.

The screenshot shows a Microsoft Copilot interface. On the left, there is a list of documents with columns for 'Modified' and 'Modified By'. The documents include 'CX', 'CX', 'CX', 'CX', '025.xlsx', '.docx', 'fay2025.png', and 'May2025.docx', all modified 28 minutes ago by 'apdunnam (BAMI)'. On the right, there is an AI-generated response:

Just now generative AI.
What are the top 3 blockers?
Just now
The top 3 blockers are:
1. Client technical readiness: This includes the preparedness of the client's technical team and infrastructure to implement the solutions [1].
2. Customer team bandwidth: This refers to the availability and capacity of the customer's team to handle the project requirements [2].
3. Security concerns: These are issues related to the security of the solutions being implemented, which can delay progress [3].
[1] [2] [3]
3 references
1 MBR_Dennis_Bottjer.docx
2 MBR_Jamir_Okafor.docx
3 MBR_Elena_Nguyen.docx
Just now Type your message

Review the first test

23. Perform another test by typing **Which reps requested additional pre-sales support?** and pressing **Return**

The screenshot shows a Microsoft SharePoint interface. On the left, there is a navigation bar with 'Home', 'Conversations', 'Documents', 'Notebook', 'Pages', 'Site contents', 'Recycle bin', and 'Edit'. The 'Documents' section is selected. On the right, there is a list of documents with columns for 'Name', 'Modified', and 'Modified By'. The documents include 'Documents', 'MBR_April_Dunnan.docx', 'MBR_Dennis_Bottjer.docx', 'MBR_Elena_Nguyen.docx', 'MBR_Jamir_Okafor.docx', 'MBR_Sales_Data_May2025.xlsx', 'MBR_Sara_Al-Mansouri.docx', 'Sales_KPI_Dashboard_May2025.png', and 'Sales_KPI_OKR_Report_May2025.docx', all modified 28 minutes ago by 'apdunnam (BAMI)'. On the far right, there is an AI-generated response:

Customized in Copilot Studio
Just now
The top 3 blockers are:
1. Client technical readiness: This includes the preparedness of the client's technical team and infrastructure to implement the solutions [1].
2. Customer team bandwidth: This refers to the availability and capacity of the customer's team to handle the project requirements [2].
3. Security concerns: These are issues related to the security of the solutions being implemented, which can delay progress [3].
[1] [2] [3]
3 references
1 MBR_Dennis_Bottjer.docx
2 MBR_Jamir_Okafor.docx
3 MBR_Elena_Nguyen.docx
Just now Type your message

Testing the agent

24. Review your response. Congratulations! You've built and deployed your SharePoint MBR Agent!

The screenshot shows a Microsoft Teams message board. On the left, there is a SharePoint list with columns 'Modified' and 'Modified By'. The list contains several items, all modified by 'apdunnam (BAMI)' 28 minutes ago. The items include '25.xlsx', 'docx', 'fay2025.png', and 'May2025.docx'. On the right, a comment from the MBR agent is displayed. The comment asks, "Which reps requested additional pre-sales support?" and provides a list of sales representatives who have requested support. The list includes April Dunnam and Dennis Bottjer. Below the list, there are two references: 'MBR_April_Dunnam.docx' and 'MBR_Dennis_Bottjer.docx'. A message input field at the bottom right says 'Type your message'.

Modified	Modified By
8 minutes ago	apdunnam (BAMI)
28 minutes ago	apdunnam (BAMI)
28 minutes ago	apdunnam (BAMI)
28 minutes ago	apdunnam (BAMI)
28 minutes ago	apdunnam (BAMI)
21 minutes ago	apdunnam (BAMI)
28 minutes ago	apdunnam (BAMI)

Just now
Which reps requested additional pre-sales support?
Just now
The sales representatives who have requested additional pre-sales support are:

- **April Dunnam:** Requested additional pre-sales support to address integration delays, client indecision, and pricing objections [1].
- **Dennis Bottjer:** Requested solution architect time to help navigate internal escalations and align deeper product support [2].

[1]: [1] [2]: [2]
2 references
1 MBR_April_Dunnam.docx
2 MBR_Dennis_Bottjer.docx
Just now
Type your message

Review the second test results

Congratulations! You've built and deployed your SharePoint MBR Agent!

Test your understanding

Key takeaways:

- **Knowledge integration** – Agents can directly access and analyze SharePoint documents for contextual responses
- **Testing importance** – Always validate agent responses before deployment to ensure accuracy
- **Deployment flexibility** – Agents can be deployed directly to SharePoint for seamless user access
- **Reference linking** – Well-configured agents provide source citations for transparency and verification

Lessons learned & troubleshooting tips:

- Test with various question types to ensure comprehensive knowledge coverage
- Check that agent responses include proper source citations
- Verify deployment permissions align with your organization's security requirements
- Remember that agents need time to index new documents after knowledge source updates

Challenge: Apply this to your own use case

- What other business processes could benefit from document-based AI agents?
- How would you customize the agent's instructions for different audiences (executives vs. managers)?
- What additional knowledge sources could enhance the agent's capabilities?
- How might you structure MBR documents to optimize agent performance?



Summary of Learnings

True learning comes from doing, questioning, and reflecting—so let's put your skills to the test.

To maximize the impact of your MBR Agent:

- **Document organization matters** – Well-structured SharePoint libraries enable better agent knowledge extraction and more accurate responses
 - **Test comprehensively** – Validate agent performance with realistic business questions before deploying to stakeholders
 - **Leverage source citations** – Agents that provide document references build trust and enable users to dive deeper into source material
 - **Deploy strategically** – SharePoint deployment puts the agent where users naturally work with documents
 - **Iterate based on feedback** – Monitor agent usage and refine knowledge sources based on common user questions and needs
-

Conclusions & Recommendations

MBR Agent golden rules:

- Keep MBR documents in consistent formats and naming conventions for optimal agent understanding
- Test agent responses against known document content to ensure accuracy before deployment
- Use specific, business-relevant questions during testing to validate real-world usefulness
- Deploy agents to locations where users naturally work to maximize adoption

- Regularly update knowledge sources to keep agent responses current and relevant
- Monitor common user questions to identify knowledge gaps and improvement opportunities

By following these principles, you'll create MBR agents that not only provide accurate information but transform how leadership teams prepare for and conduct business reviews, turning hours of manual document review into minutes of intelligent conversation.

