

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.

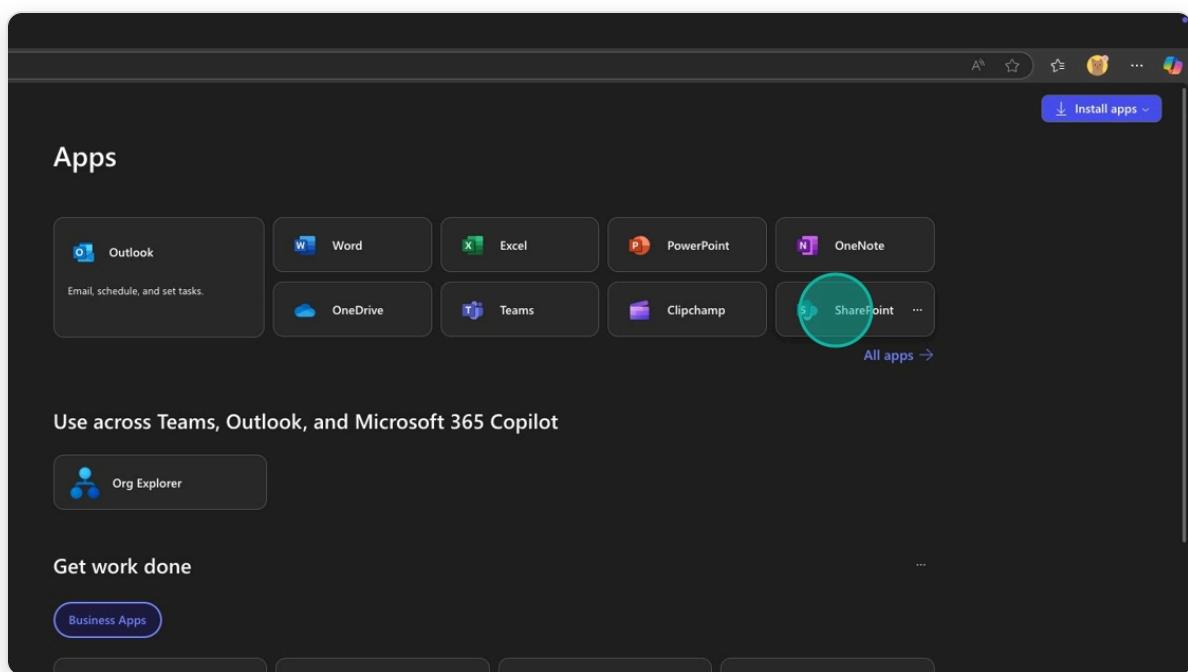
Objective

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. At the top left is the SharePoint logo and a search bar labeled 'Search in SharePoint'. Below the search bar is a 'Create news post' button. A red box highlights the 'Create site' button, which is located just below the news post button. To the right of the 'Create site' button is a large promotional image for SharePoint pages. On the left side of the page, there's a sidebar with sections for 'Following' (MBR, Sales, Helpdesk, Onboarding) and 'Recent' (Onboarding).

Create Site

3. Select Team Site

The screenshot shows a modal dialog titled 'Create a site: Select the site type'. It instructs 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 main sections: 'Team site' (left) and 'Communication site' (right). The 'Team site' section features an illustration of two people working together on a screen, with the text: 'Create a private space to collaborate with your team.' Below this are four bullet points: 'Track and stay updated on project status', 'Share team resources and co-author content', 'All site owners and members publish site content', and 'Can connect to other Microsoft 365 products'. A red box highlights the entire 'Team site' section. The 'Communication site' section features an illustration of a person presenting to a large audience via a screen, with the text: 'Share information that engages a broad audience.' Below this are three bullet points: 'Create a portal or subject-focused site', 'Engage dozens or thousands of viewers', and 'Few content authors and many site visitors'.

Team Site

4. Select Standard team

Select a template

From Microsoft From your organization

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

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

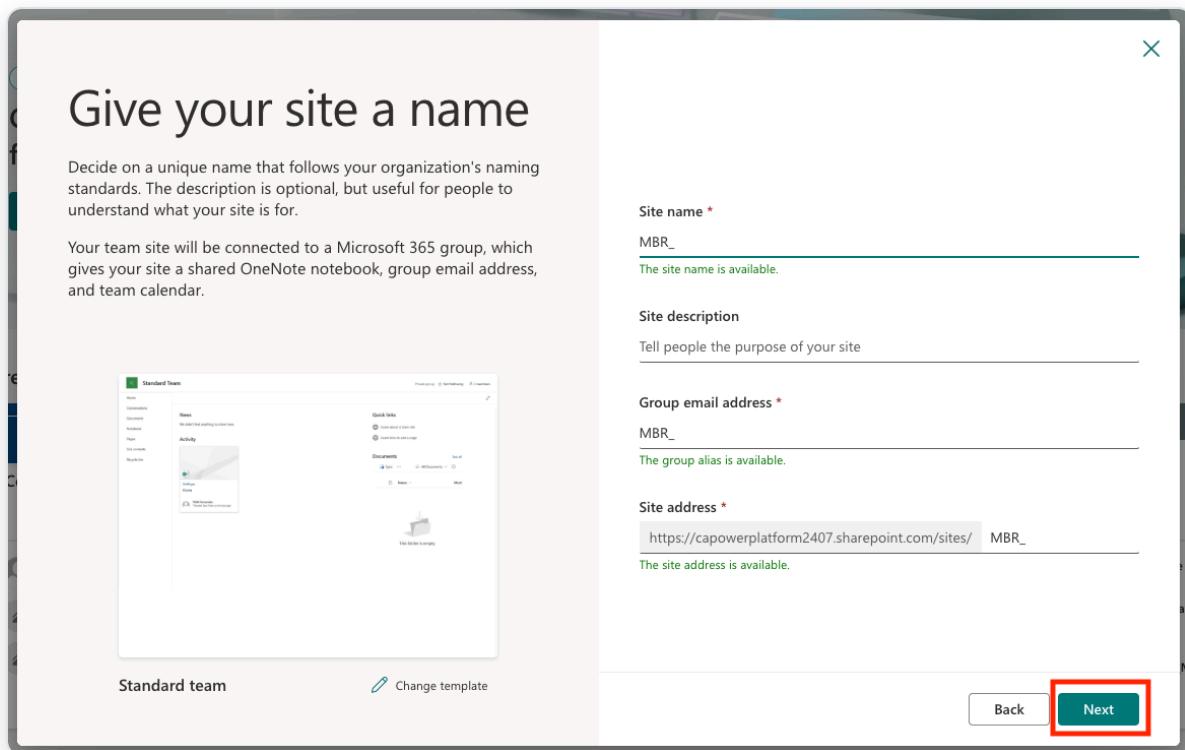
Activity

Documents

Back Use template

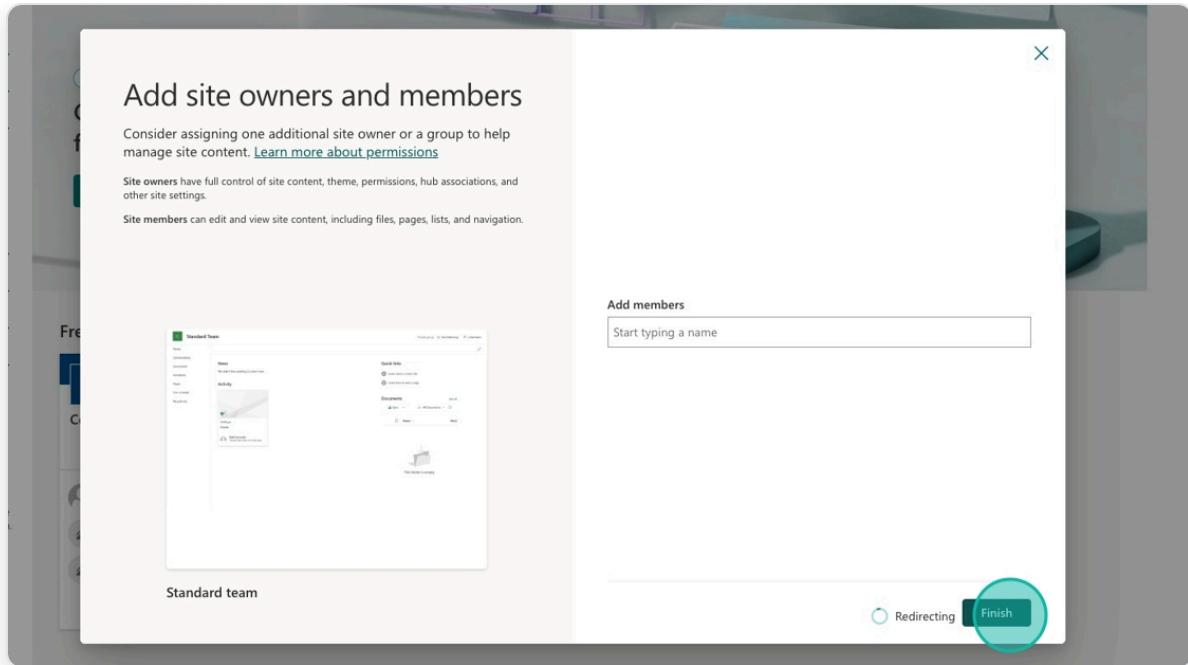
Use Template

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



Create Site

7. Click **Finish**



Select Finish

Upload MBR documents

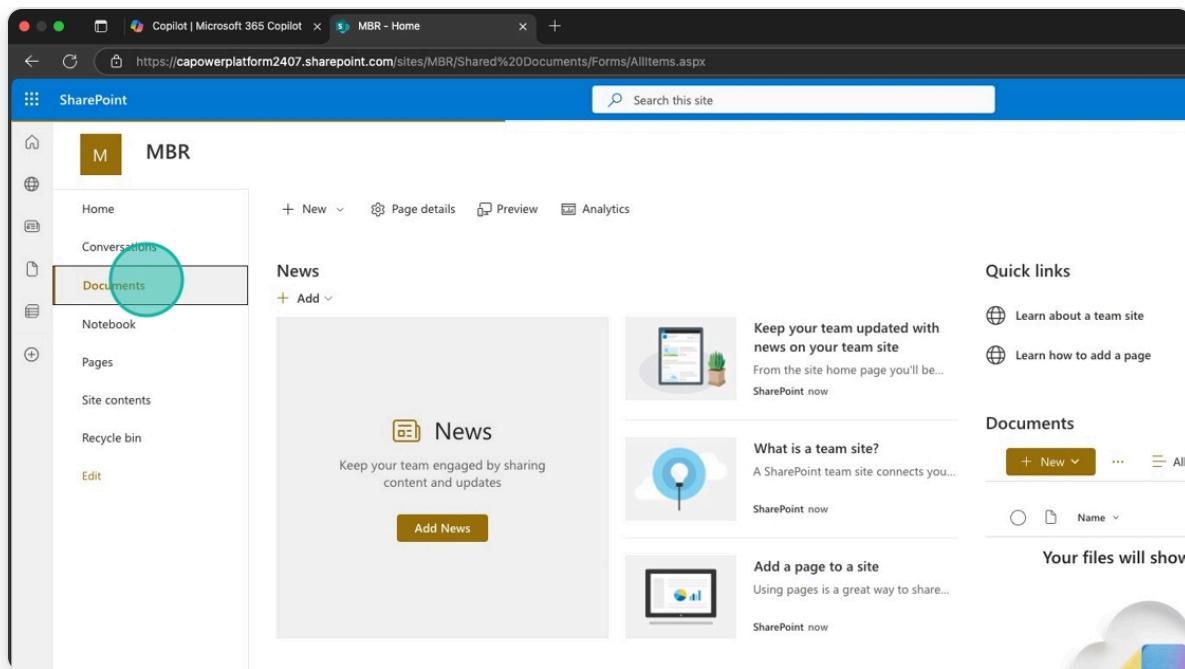


Important:

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

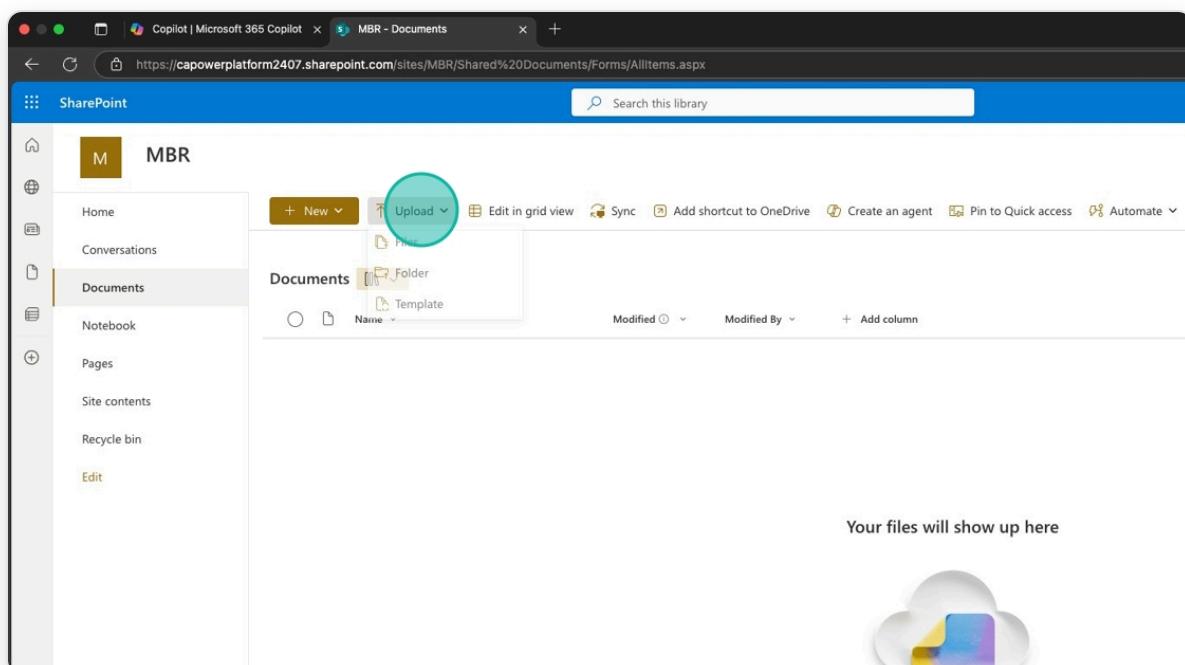
9. Select [Documents](#) in the left navigation



The screenshot shows the SharePoint Home page for a site named 'MBR'. The left navigation bar has 'Documents' selected, indicated by a green circle. The main content area features a 'News' section with a 'News' button and three cards: 'Keep your team updated with news on your team site', 'What is a team site?', and 'Add a page to a site'. On the right, there's a 'Quick links' section with 'Learn about a team site' and 'Learn how to add a page', and a 'Documents' section with a 'New' button.

Open Document Library

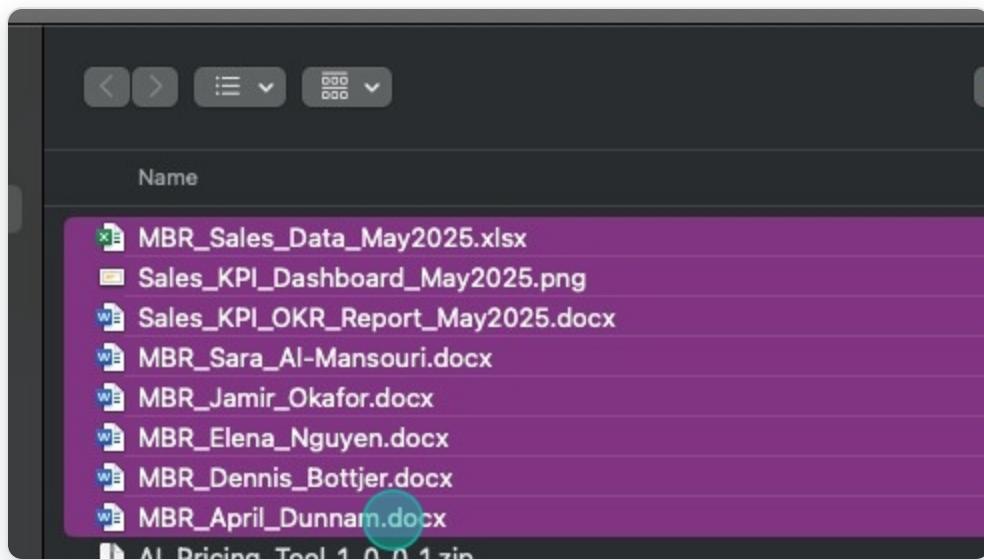
10. Select **Upload**



The screenshot shows the SharePoint 'Documents' library page for the 'MBR' site. The 'Upload' button in the ribbon is highlighted with a green circle. The library interface includes a search bar, a toolbar with options like 'Edit in grid view', 'Sync', and 'Automate', and a list of items with columns for 'Modified', 'Modified By', and 'Name'. A message at the bottom says 'Your files will show up here' with a cloud icon.

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.

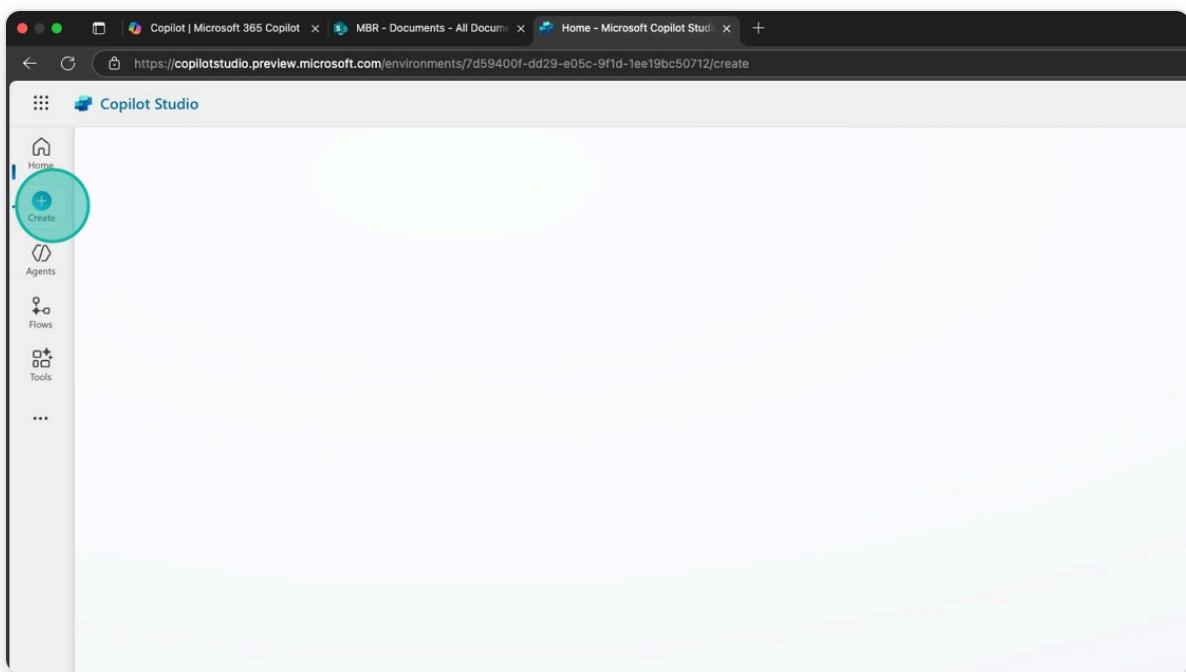
Objective

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

Step-by-step instructions

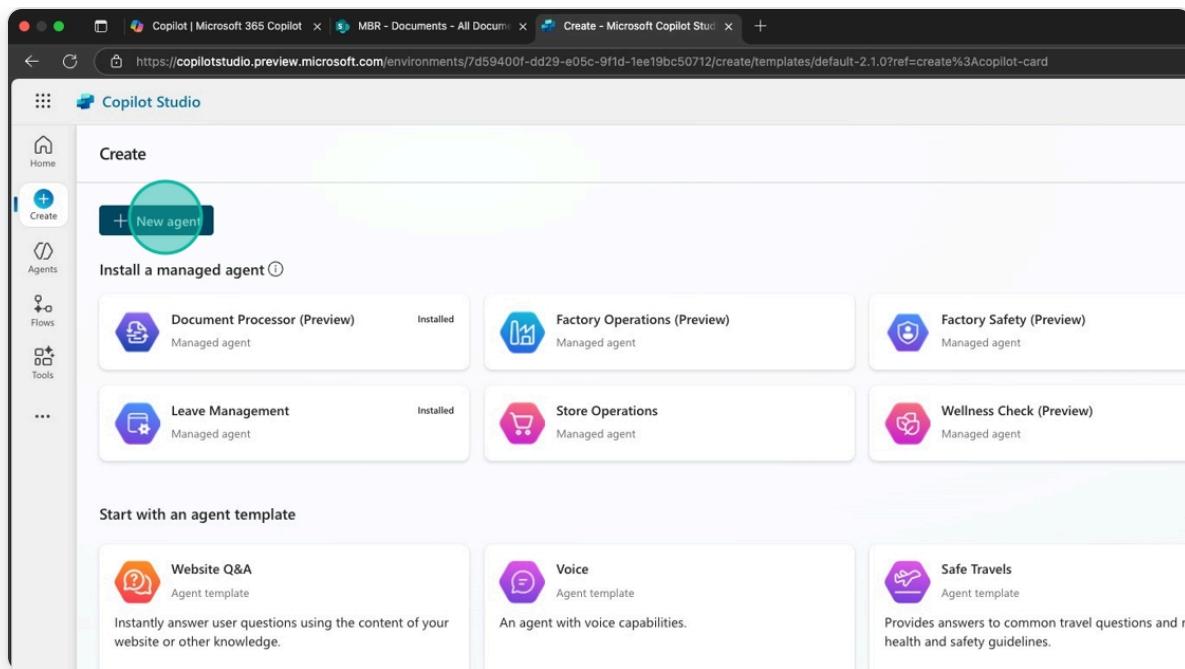
Create the agent in Copilot Studio

1. Open a new browser tab and navigate to [copilotstudio.microsoft.com](https://copilotstudio.preview.microsoft.com/environments/7d59400f-dd29-e05c-9f1d-1ee19bc50712/create) ↗. Select **Create**



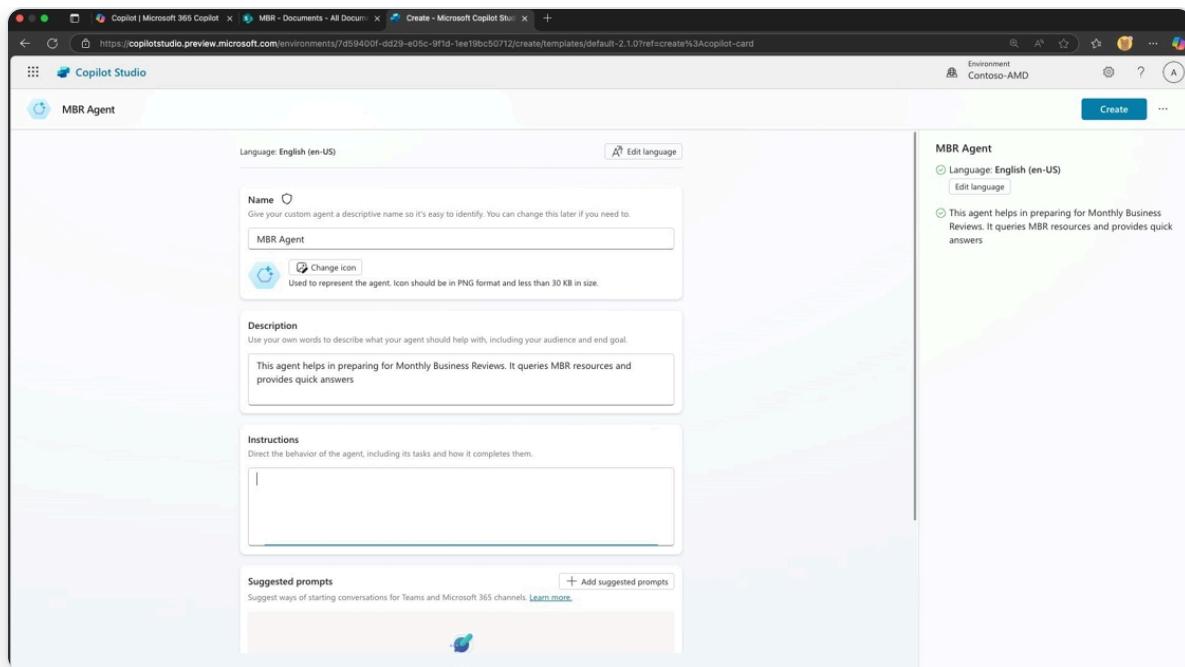
Select Create

2. Select **New agent**



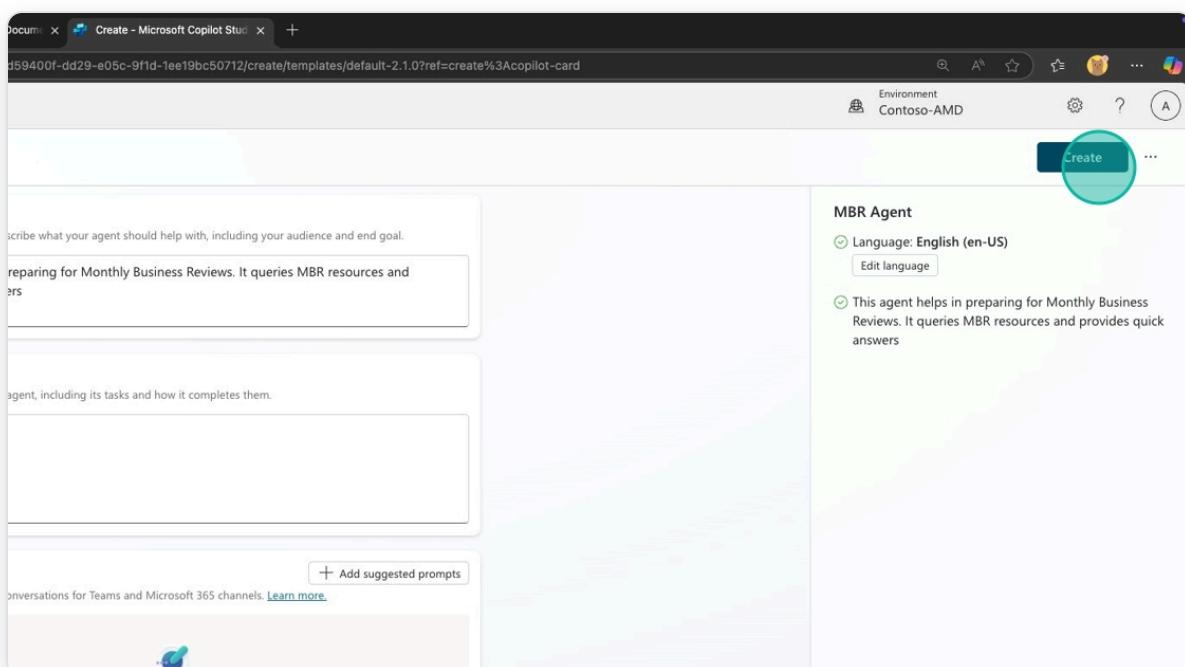
Select New Agent

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

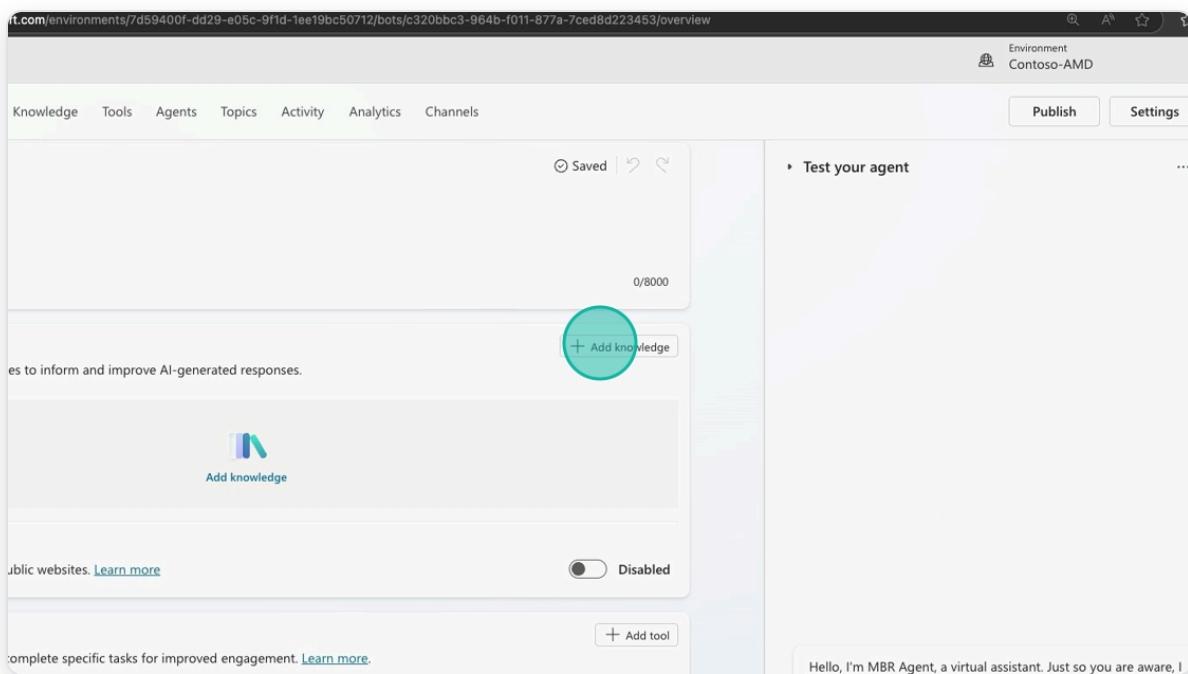
5. Select **...** to go into **Edit advanced settings**. Make sure the agent is created as part of one of your **solutions**.
6. Select **Create**



Select Create

Add SharePoint knowledge source

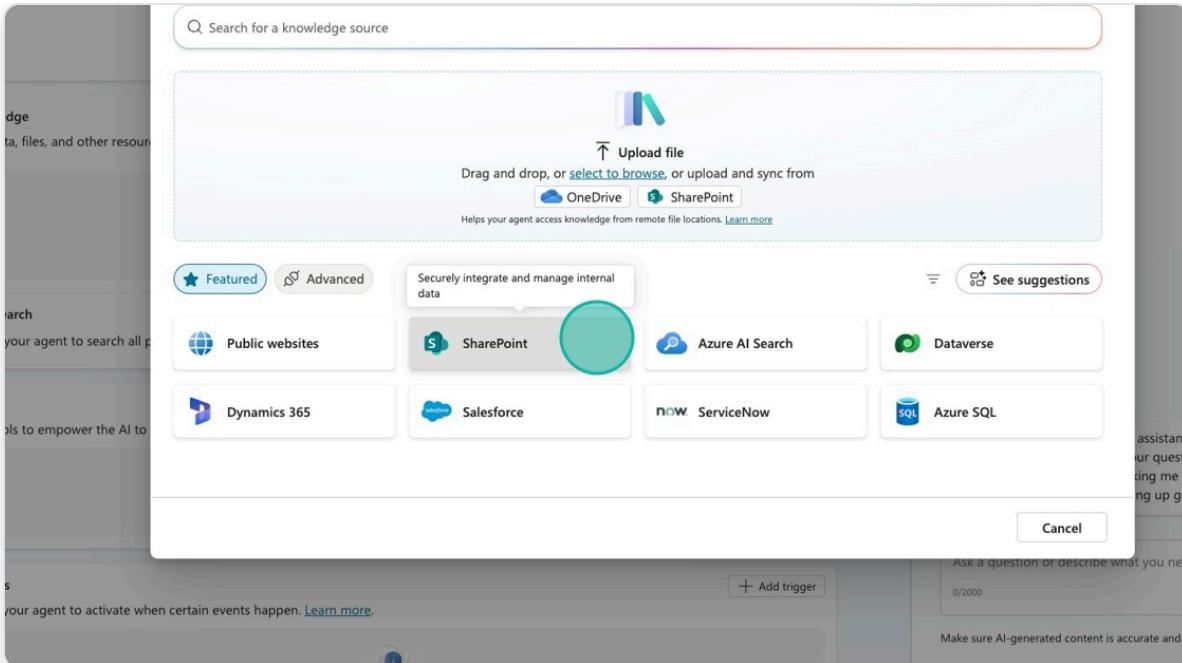
7. Select Add knowledge



The screenshot shows the Microsoft Bot Framework Overview page for an environment named '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 count of 0/8000. Below the input field is a button labeled '+ Add knowledge' with a green circle highlighting it. To the right, there's a section titled 'Test your agent' and a message from the MBR Agent. A toggle switch for connecting to public websites is set to 'Disabled'.

Select Add Knowledge

8. Select SharePoint



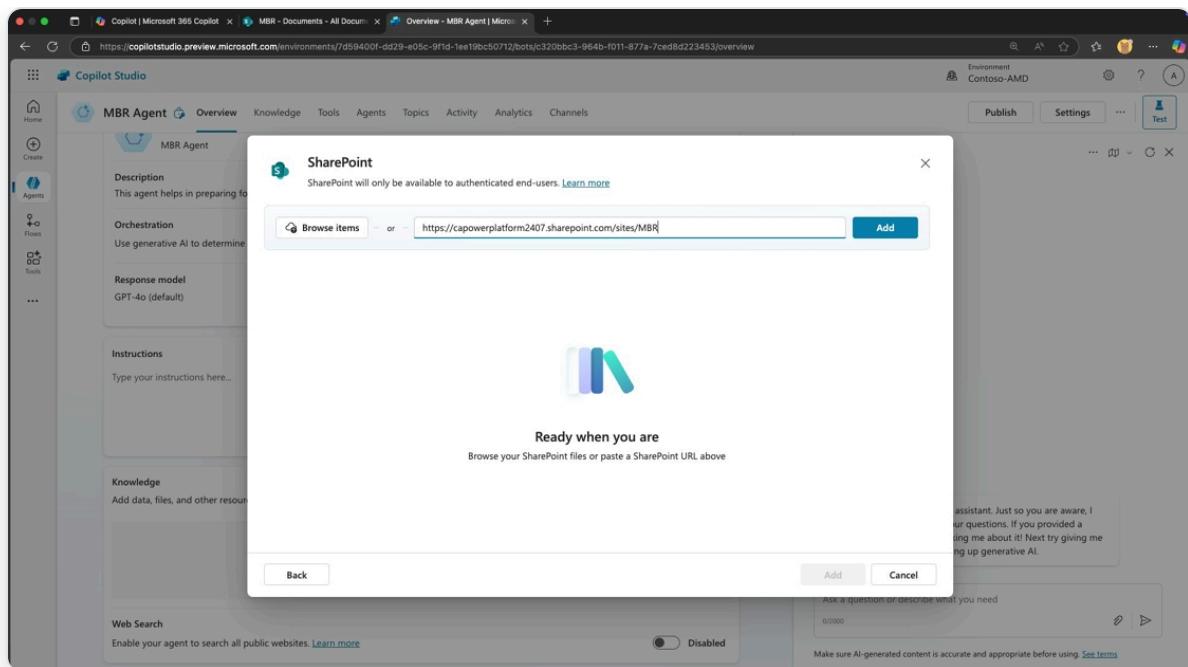
Select SharePoint

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



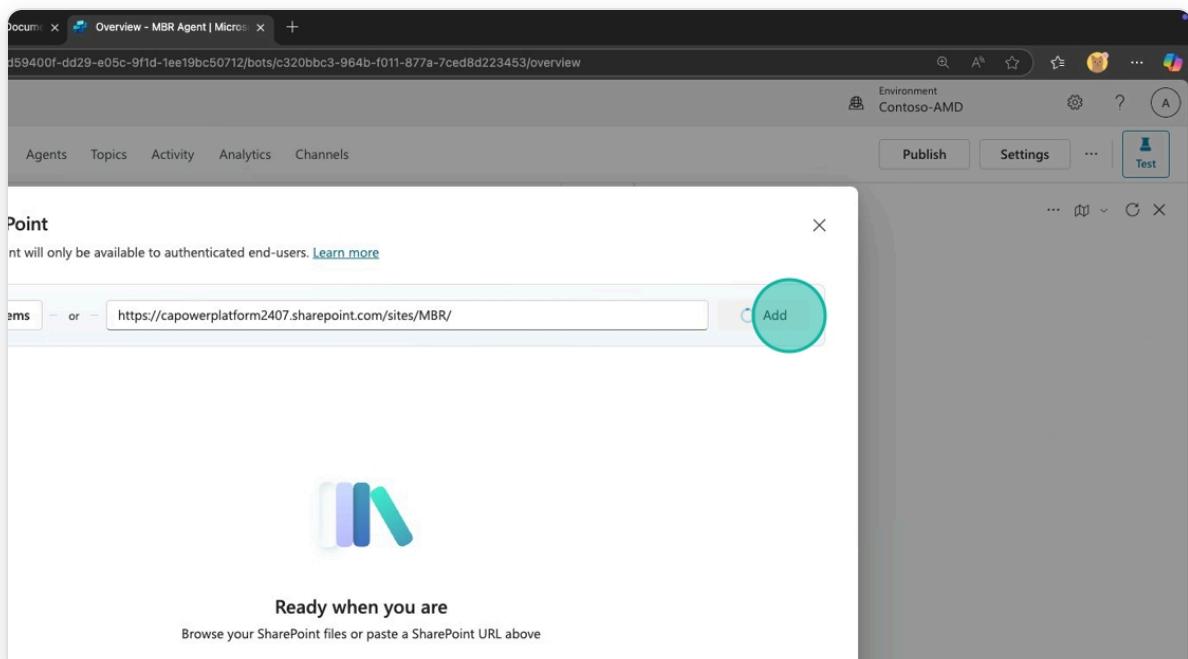
Important:

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



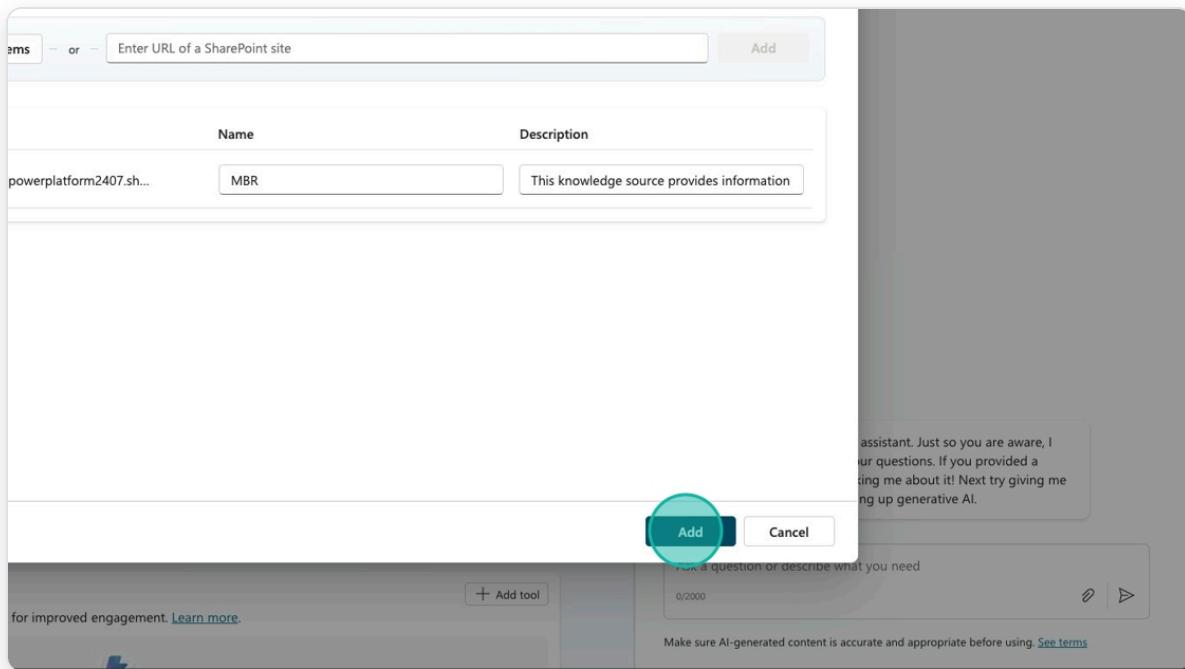
Paste SharePoint URL

10. Select Add



Select Add Knowledge

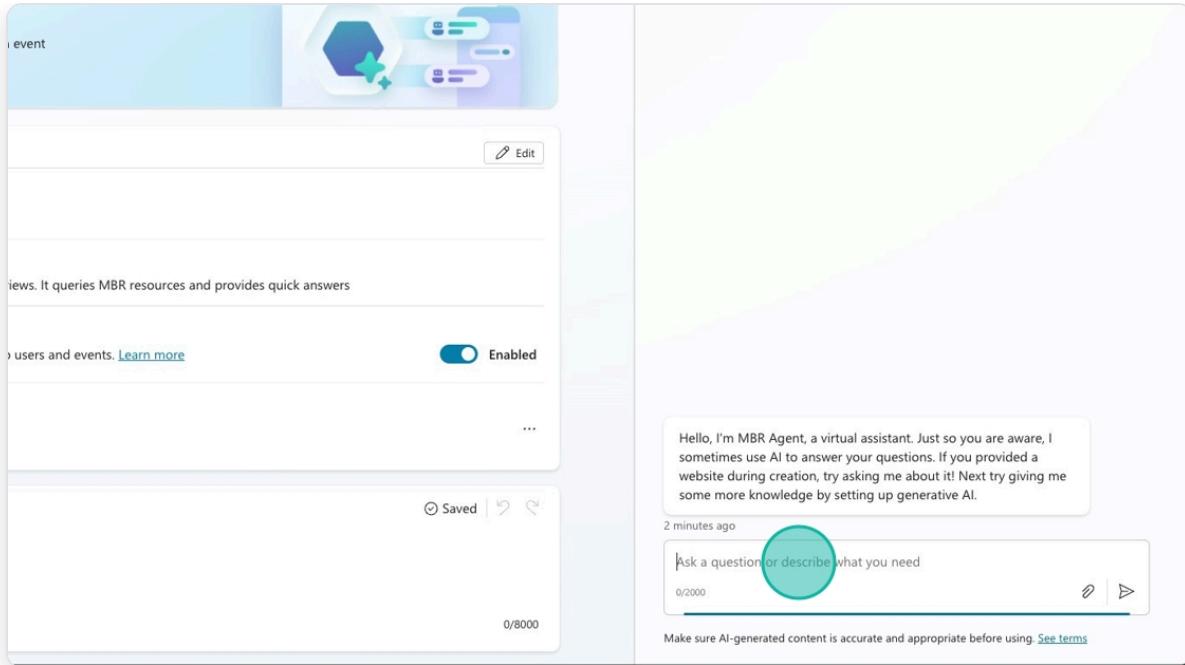
11. Select Add again



Select Add

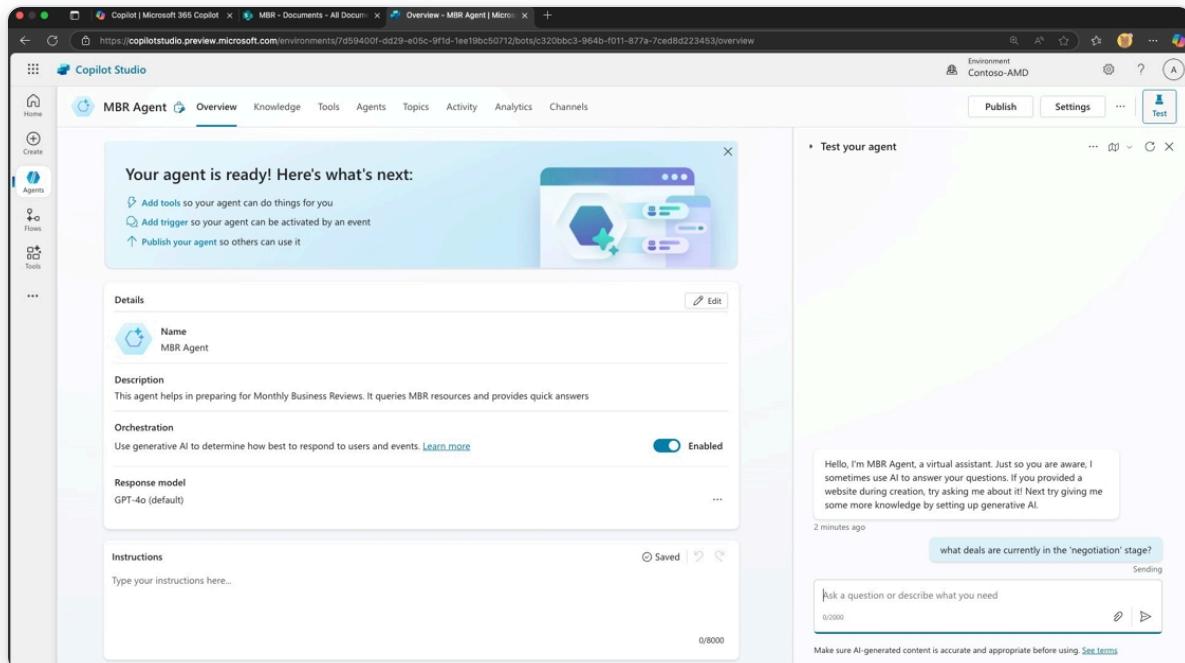
Test the agent

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



Test Panel

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



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 Microsoft Bot Framework interface. On the left, there is a 'Query' section with the text 'deals currently in the 'negotiation' stage'. Below it is a 'Response' section titled 'Deals Currently in the 'Negotiation' Stage' which lists several deals: Dennis Bottjer (Northwind [1], Blue Yonder [1]), Elena Nguyen (Woodgrove Bank [1], ...). There is a 'See more' link. Under 'Referenced sources', there is a snippet from 'MBR' about sales rep customer deal values. At the bottom is an 'Edit knowledge' button.

On the right, there is an 'Activity' pane with a message from '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.' This message was sent '3 minutes ago'. Below it is a question 'what deals are currently in the 'negotiation' stage?' with a 'Just now' timestamp. The AI's response lists the same deals as the 'Response' section. It also mentions 'These deals are currently in the negotiation stage' and provides a reference to '1 MBR_Sales_Data_May202...'. A teal circle highlights the 'Just now' timestamp in the activity pane.

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.

The screenshot shows the Microsoft Bot Framework Overview page for a bot named 'MBR Agent'. The top navigation bar includes tabs for Agents, Topics, Activity, Analytics, and Channels. The right side of the header shows the environment as 'Contoso-AMD' and has buttons for Publish (highlighted with a green circle), Settings, and Test. A modal window titled 'What's next:' is open, containing sections for 'Add tools', 'Add trigger', and 'Publish your agent'. The 'Publish your agent' section includes a 'Publish' button and a toggle switch labeled 'Enabled'. To the right, a 'Test your agent' panel shows a message from the bot: '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 history: a user asks 'what deals are currently in the 'negotiation' stage?' and the bot responds with a list of deals.

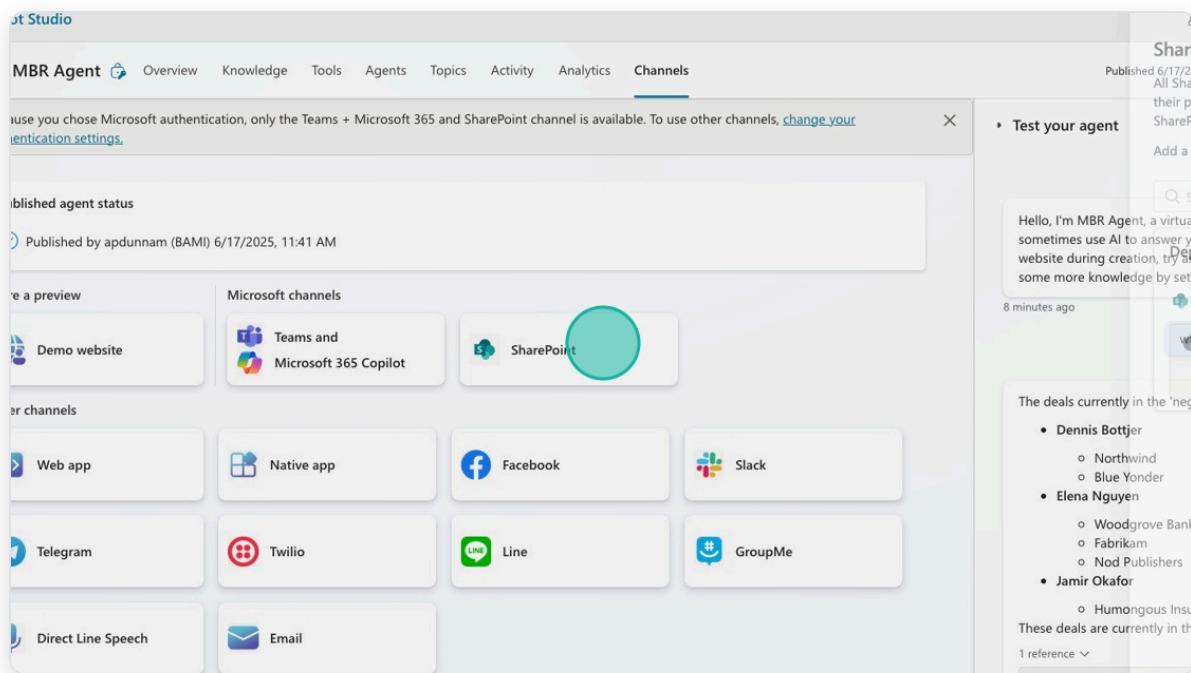
Select Publish

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

The screenshot shows the Microsoft Bot Framework Overview page for the same 'MBR Agent'. The top navigation bar now has the 'Channels' tab selected (highlighted with a green circle). The right side of the header shows the environment as 'Contoso-AMD' and has buttons for Publish, Settings, and Test. A modal window titled 'Your agent is ready! Here's what's next:' is open, containing sections for 'Add tools', 'Add trigger', and 'Publish your agent'. The 'Publish your agent' section includes a 'Publish' button and a toggle switch labeled 'Enabled'. To the right, a 'Test your agent' panel shows a message from the bot: '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 history: a user asks 'what deals are currently in the 'negotiation' stage?' and the bot responds with a list of deals.

Select Channels

17. Select SharePoint

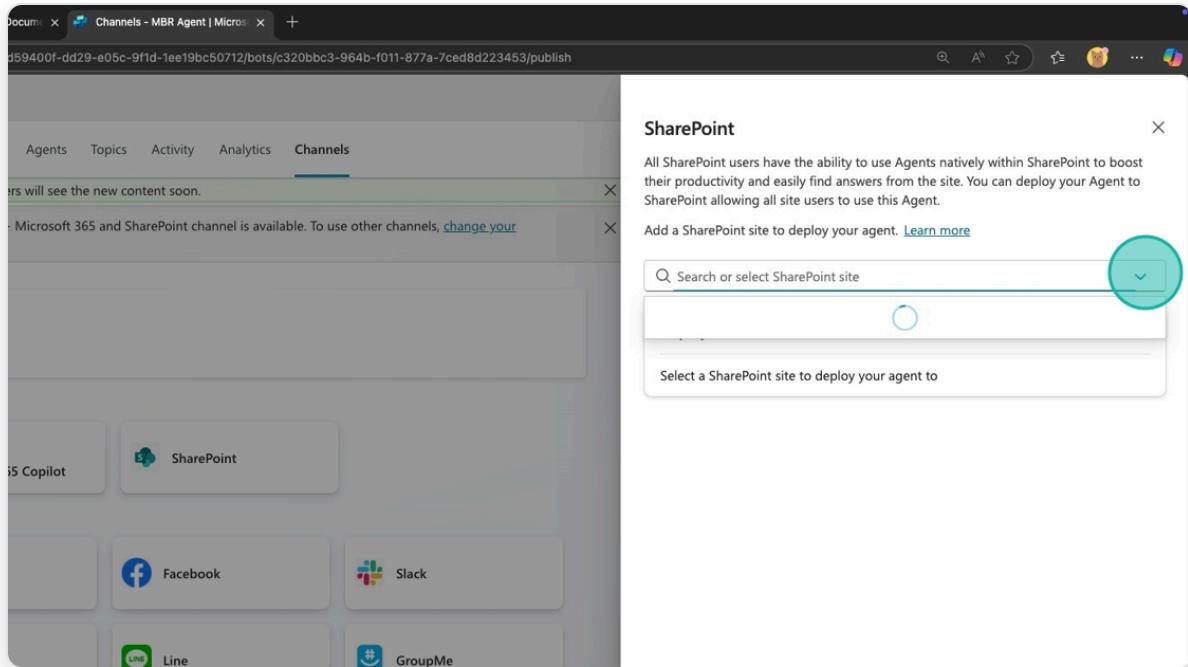


Select SharePoint

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

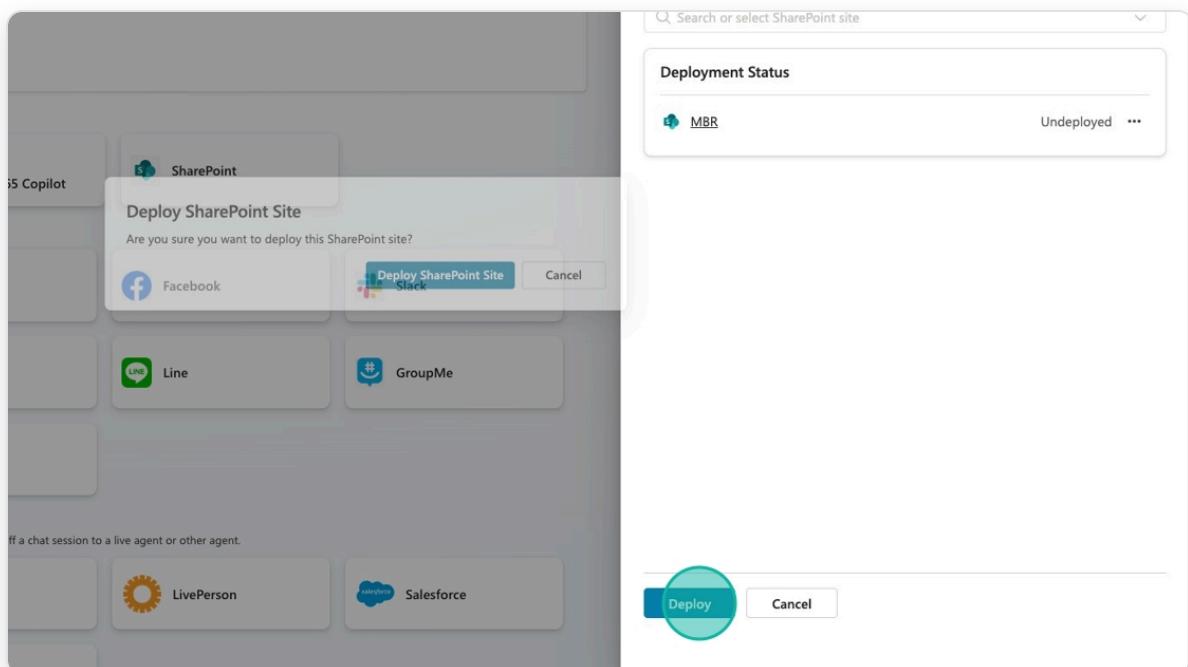


Important: Only sites where the user has **Edit** permissions can be used. Otherwise, an error will be displayed.



Select the SharePoint Site

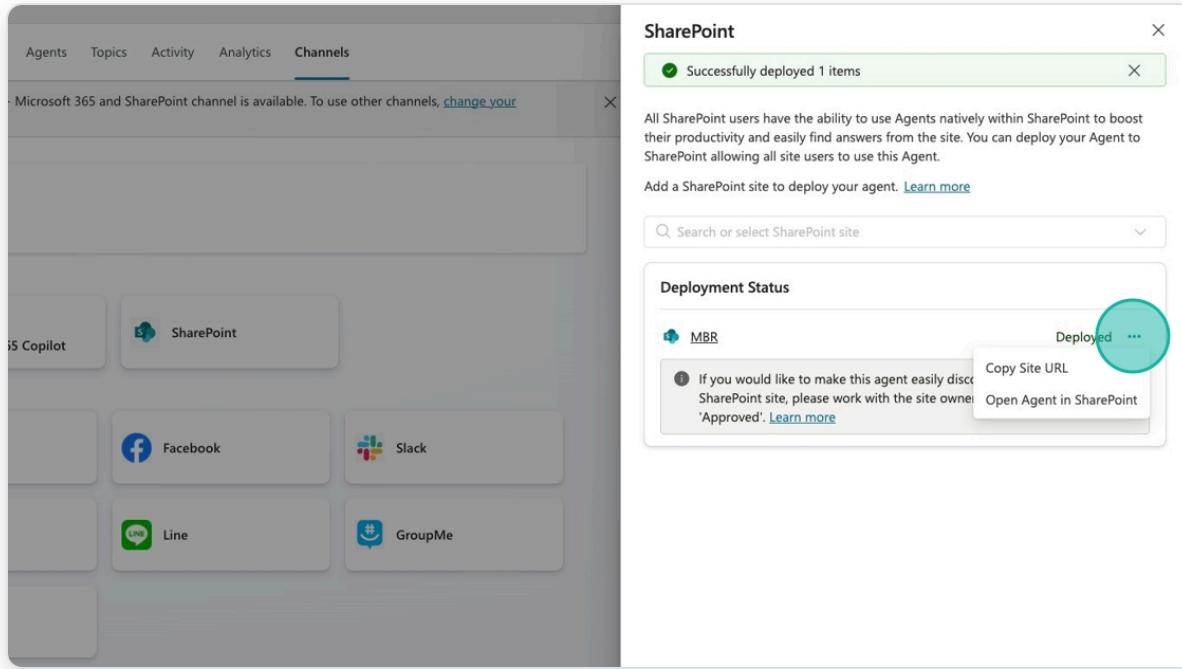
19. Select Deploy



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  in the text input and pressing 

MBR - Documents - All Document Items

Search this library

Public group Following 1 member

MBR Agent Customized in Copilot Studio

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.

Just now What are the top 3 blockers? Sending Type your message

Name	Modified	Modified By
Documents	8 minutes ago	apdunnam (BAMI)
MBR_Agent_cr30a_mbrAgent.age...	A few seconds ago	apdunnam (BAMI)
MBR_April_Dunnam.docx	28 minutes ago	apdunnam (BAMI)
MBR_Dennis_Bottjer.docx	28 minutes ago	apdunnam (BAMI)
MBR_Elena_Nguyen.docx	28 minutes ago	apdunnam (BAMI)
MBR_Jamir_Okafor.docx	28 minutes ago	apdunnam (BAMI)
MBR_Sales_Data_May2025.xlsx	21 minutes ago	apdunnam (BAMI)
MBR_Sara_Ai-Mansouri.docx	28 minutes ago	apdunnam (BAMI)
Sales_KPI_Dashboard_May2025.png	28 minutes ago	apdunnam (BAMI)
Sales_KPI_OKR_Report_May2025.docx	28 minutes ago	apdunnam (BAMI)

Add real-time chat Add Microsoft Teams to collaborate in real-time and share resources across Microsoft 365 with your team. Add Microsoft Teams

Return to classic SharePoint

Testing the agent

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

generative AI.

Just now What are the top 3 blockers? Just now

The top 3 blockers are:

- Client technical readiness:** This includes the preparedness of the client's technical team and infrastructure to implement the solutions [1 ↗].
- Customer team bandwidth:** This refers to the availability and capacity of the customer's team to handle the project requirements [2 ↗].
- Security concerns:** These are issues related to the security of the solutions being implemented, which can delay progress [3 ↗].

[1 ↗]; [1 ↗][2 ↗]; [2 ↗][3 ↗]; [3 ↗]

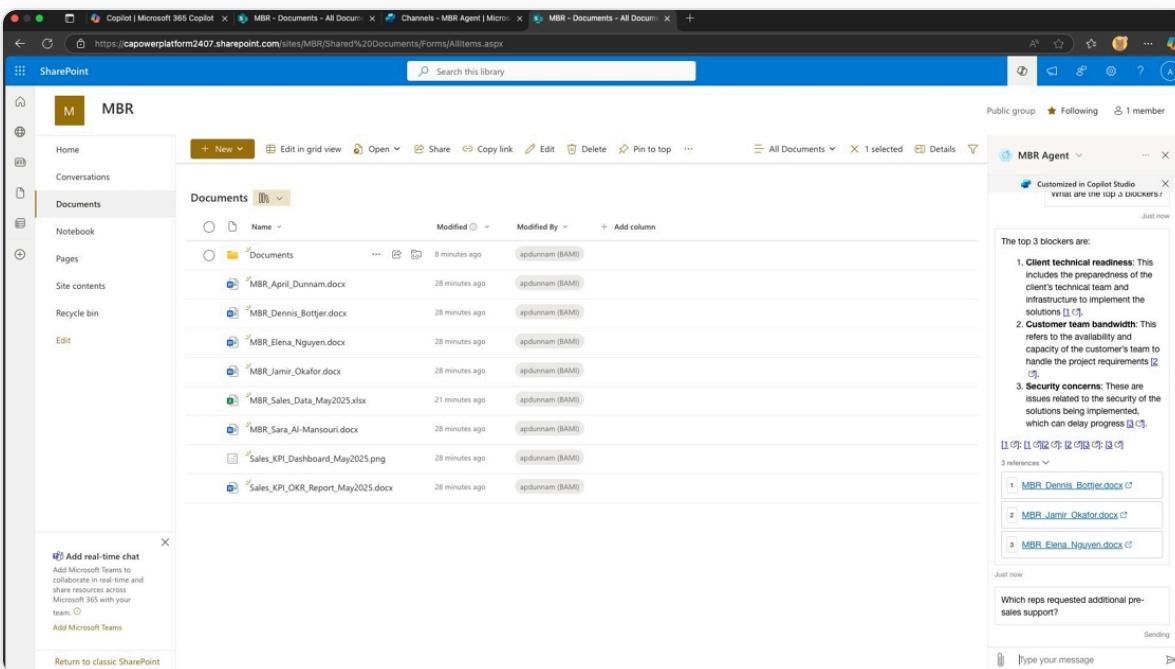
3 references ▾

- 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**



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 with a SharePoint document library integrated. On the left, there's a list of documents from a library named 'SharePoint MBR Agent'. The list includes files like 'May2025.xlsx', 'May2025.docx', 'fay2025.png', and 'May2025.pdf'. The 'Modified' and 'Modified By' columns are shown. On the right, a message board conversation is displayed. A user asks, 'Which reps requested additional pre-sales support?'. The response is: '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 ↗]'. Below the response, there are two references: '1 MBR_April_Dunnam.docx ↗' and '2 MBR_Dennis_Bottjer.docx ↗'. At the bottom, there's a message input field with a placeholder '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?
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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
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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.
