



Microsoft AI Agents Roadshow

Exploring Microsoft Platform for the Agentic AI Era

XXXXXX – Modern Work PSA
YYYYYY – Data & AI PSA
ZZZZZZ – Biz Apps PSA

Microsoft Americas
Global Partner Solutions (GPS) - Technical Team
Partner Solution Architects (PSA)



Source: [LinkedIn Post](#)



Our Partners' Agentic AI Opportunity:
**“Mastering Today’s AI Tech
Paves the Way
for
Future Success.”**

Event Overview

2 Day immersive workshop with Hands-on labs and a Mini Hack challenge

Day 1:

- Vision
- Copilot Chat and Copilot for M365 Overview
- Copilot Studio Overview
- Hands-on exercises – Building an agent with Copilot Studio
- Azure AI – Overview

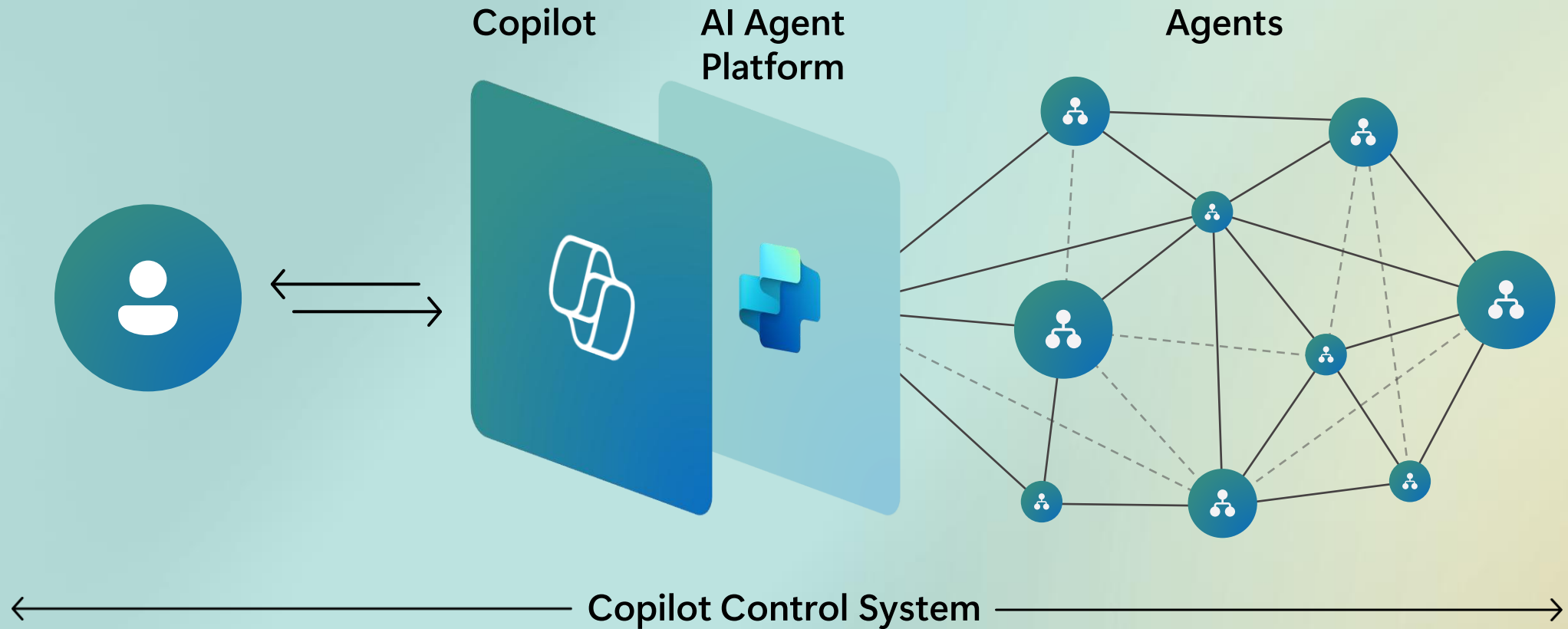
Day 2:

- Hands-on exercises – Extending Copilot Studio agent with Azure AI services
- Hands-on exercise – Create an Agent with Azure AI Foundry
- Mini Hack challenge

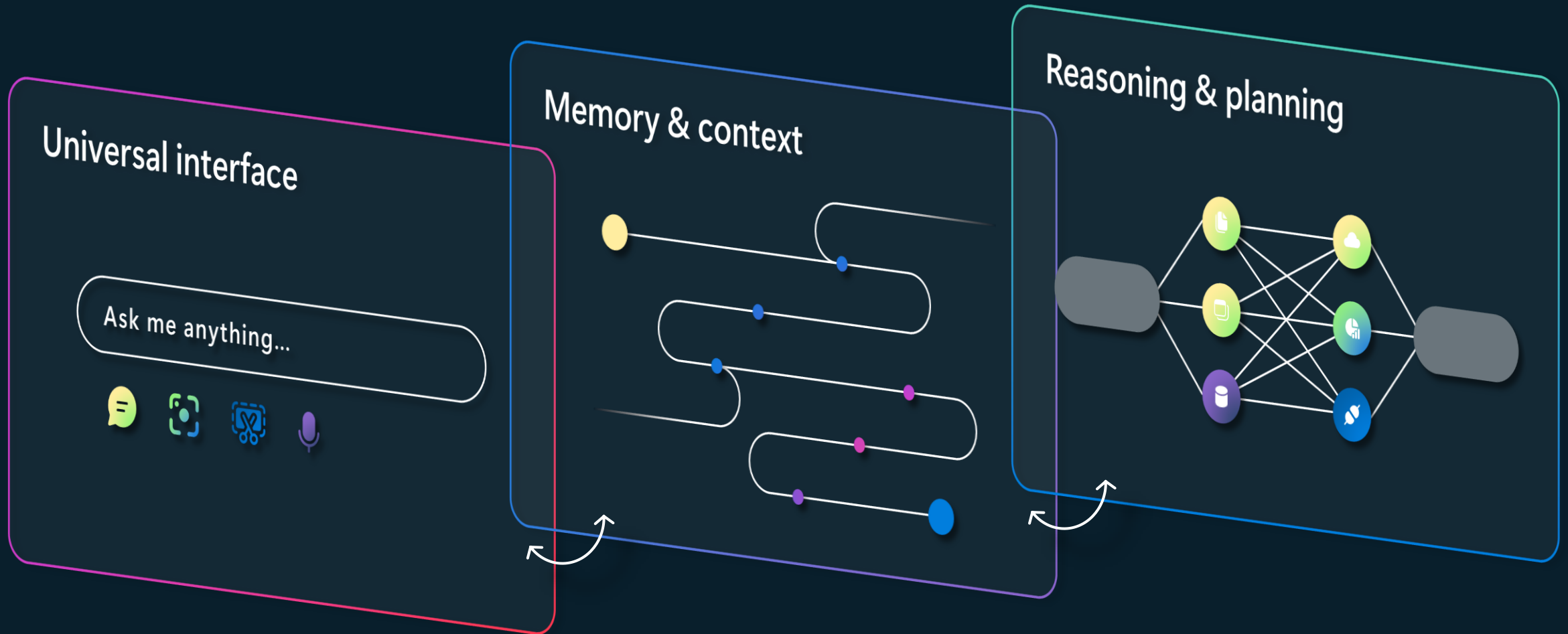
Microsoft's Vision for Agentic AI



Copilot is the UI for AI



We are in a technology shift



Building an agentic world



Personal
agents



Organizational
agents



Business process
agents



Cross-org
agents



Copilot

**Every employee will
have a Copilot**

Works as your personal assistant

Grounded in work content like email,
meetings and documents

The UI for AI



Agents

**Every business process will
have one or more agents**

AI-powered system with actions,
triggers and knowledge

Works on behalf of employees, teams
and functions

Connected to Copilot or autonomous



Agents

**Every business process will
have one or more agents**

AI-powered system with actions,
triggers and knowledge

Works on behalf of employees, teams
and functions

Connected to Copilot or autonomous

Agents You Build

Tailored to your unique business processes.

Agents Built by Microsoft

Employee Self-Serve, SharePoint Agents,
Dynamics 365 agents +

Agents Built by 3rd Party ISVs

Adobe, ServiceNow, SAP, and many more.

Agents in Microsoft 365



Facilitator
agent



Project Manager
agent



Employee
Self-Service agent



SharePoint
agents



Interpreter
agent

aka.ms/AgentsinM365



Copilot Studio

Autonomous agents



Sales
Qualification



Supplier
Communications



Account
Reconciliation



Time and
Expense



Customer Intent



Sales Order



Financial
Reconciliation



Scheduling
Operations



Customer
Knowledge
Management



Case Management

Third-party agents



cohere

LinkedIn

SAP

servicenow



aka.ms/ThirdPartyAgents

Dynamics 365 Agents



Sales
Qualification



Case
Management



Account
Reconciliation



Time and
Expense



Supplier
Communications



Customer
Intent



Knowledge
Management



Sales
Order



Scheduling
Operations



Financial
Reconciliation

Transform the way you work with Copilot + Agents



Copilot makes agents more personal to you

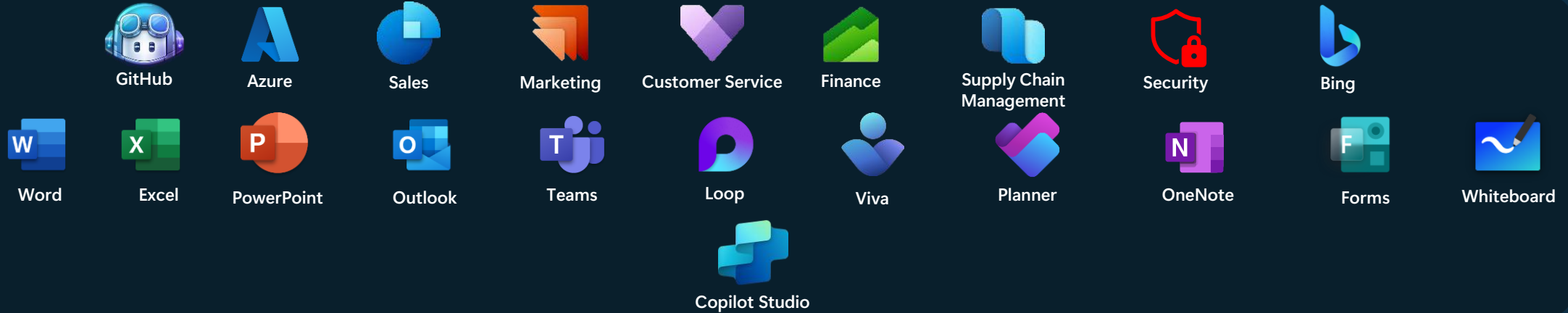
Agents make Copilot more capable

Together, they benefit from consistent security, governance & management

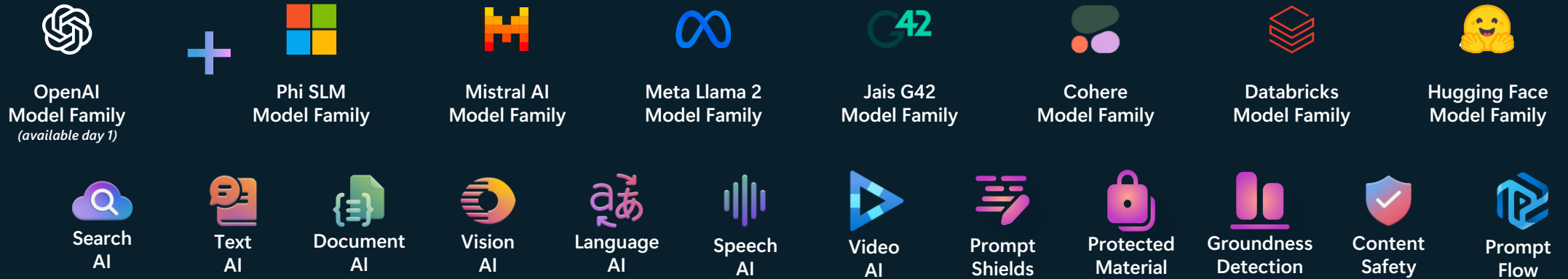
Microsoft's AI Ecosystem



Copilot



AI Foundry



Machine Learning Studio



Microsoft offers multiple ways to **build agents**



Copilot Studio

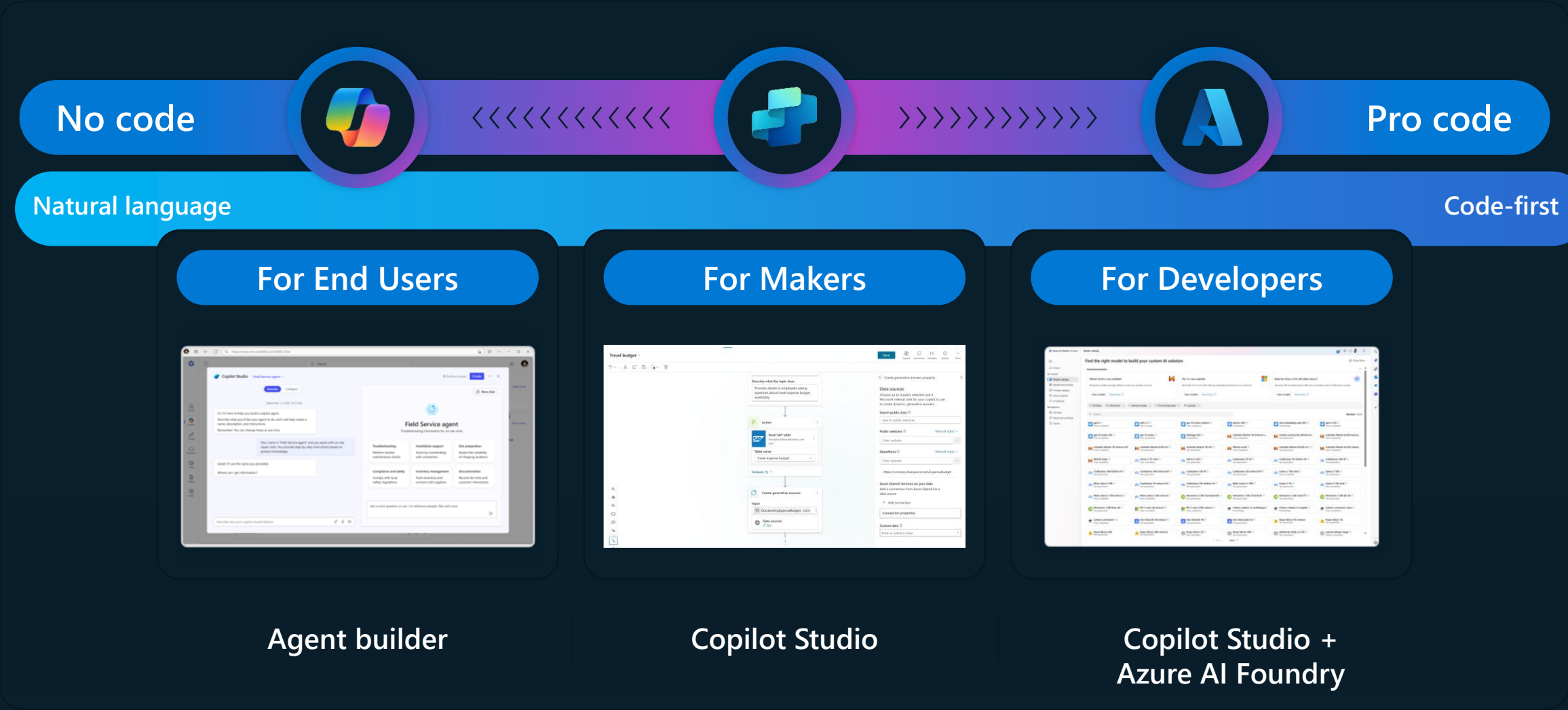


Visual Studio



GitHub

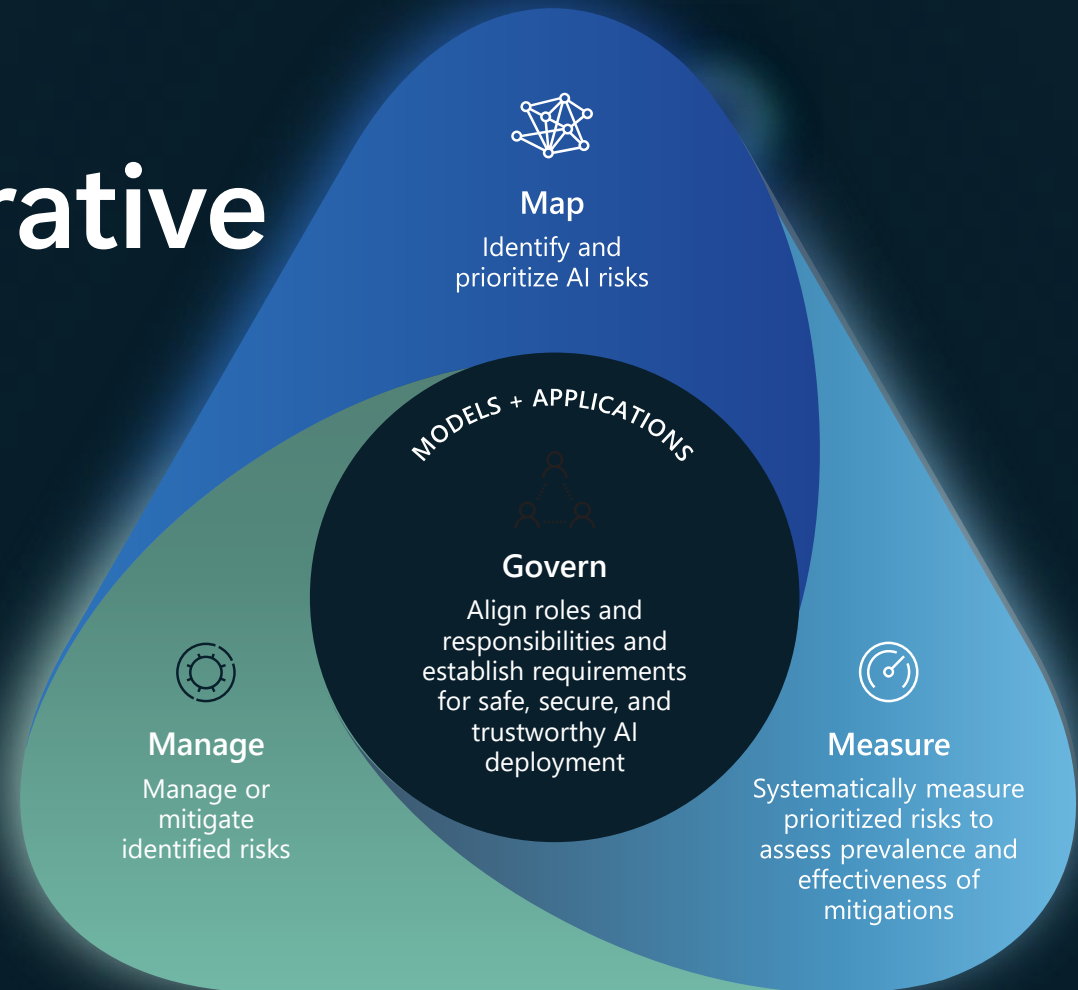
Microsoft AI Technologies and Platforms: Agent tooling



Simple AI Decision Guide



How we build generative AI systems responsibly



NIST AI Risk Management Framework

Microsoft's AI Principles



Fairness



Reliability
& Safety



Privacy &
Security



Inclusiveness



Transparency



Accountability

For Microsoft, security is job 1



...prioritizing security above all else is critical to our company's future"

Satya Nadella
Chairman and CEO



A more resilient and
transparent Microsoft

3 Principles of Microsoft's Secure Future Initiative

Secure by Design

Security comes first when designing any product or service

Secure by Default

Security protections are enabled and enforced by default, require no extra effort, and are not optional

Secure Operations

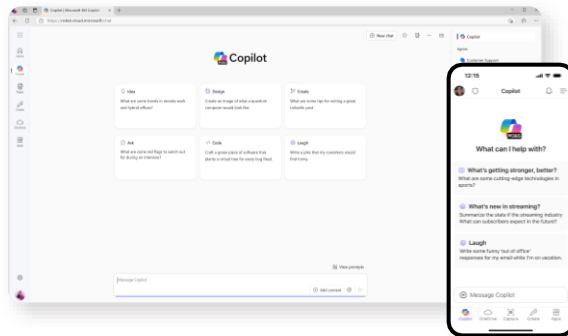
Security controls and monitoring will continuously be improved to meet current and future threats



Agents in Microsoft 365



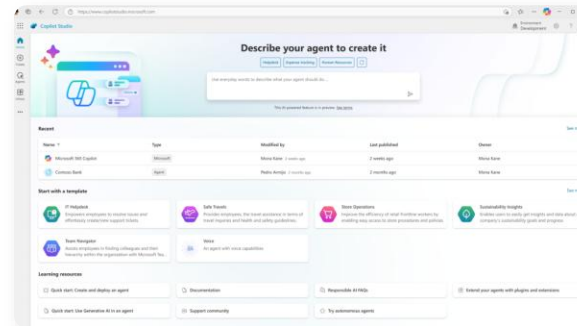
Microsoft 365 Copilot Chat



Chat

Free, secure AI chat –
powered by GPT 4o and web grounded

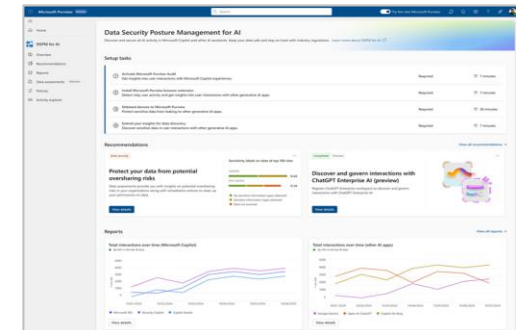
+



Agents

Integrated into the chat experience and
paid for on a consumption basis

+



IT Controls

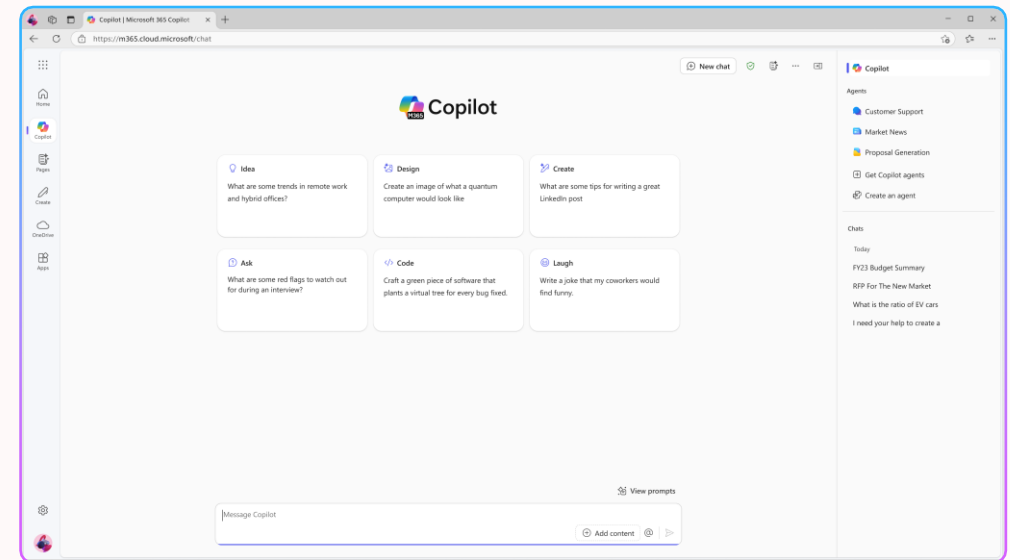
Enterprise Data Protection
and agent management

Your company's approved AI chat tool

Microsoft 365 Copilot Chat is an AI chat tool built **specifically for work**. It uses the latest AI models and data from the web to answer your questions, generate content and ideas, and find information. It also protects your data so information from your chat conversation does not get exposed to the public.

In addition, with Copilot Chat you can:

- Upload files to get responses based on information from your work documents, presentations, etc¹.
- Generate images¹ and data visualizations.
- Refine and collaborate on chat responses.
- Connect Copilot Chat to your organization data like team documents and internal SharePoint sites².



Get started by going to [M365Copilot.com](https://m365cloud.microsoft.com/chat)

¹Image generation and file upload limits apply.

²Connecting Copilot Chat to your organization data is only available if your organization admin has enabled this capability.



Microsoft 365 Copilot

Your AI assistant for work

\$30

Copilot Chat

Free, secure AI chat



Chat

Work-grounded

Copilot in M365 apps

Teams, Outlook, Word, Excel, PowerPoint

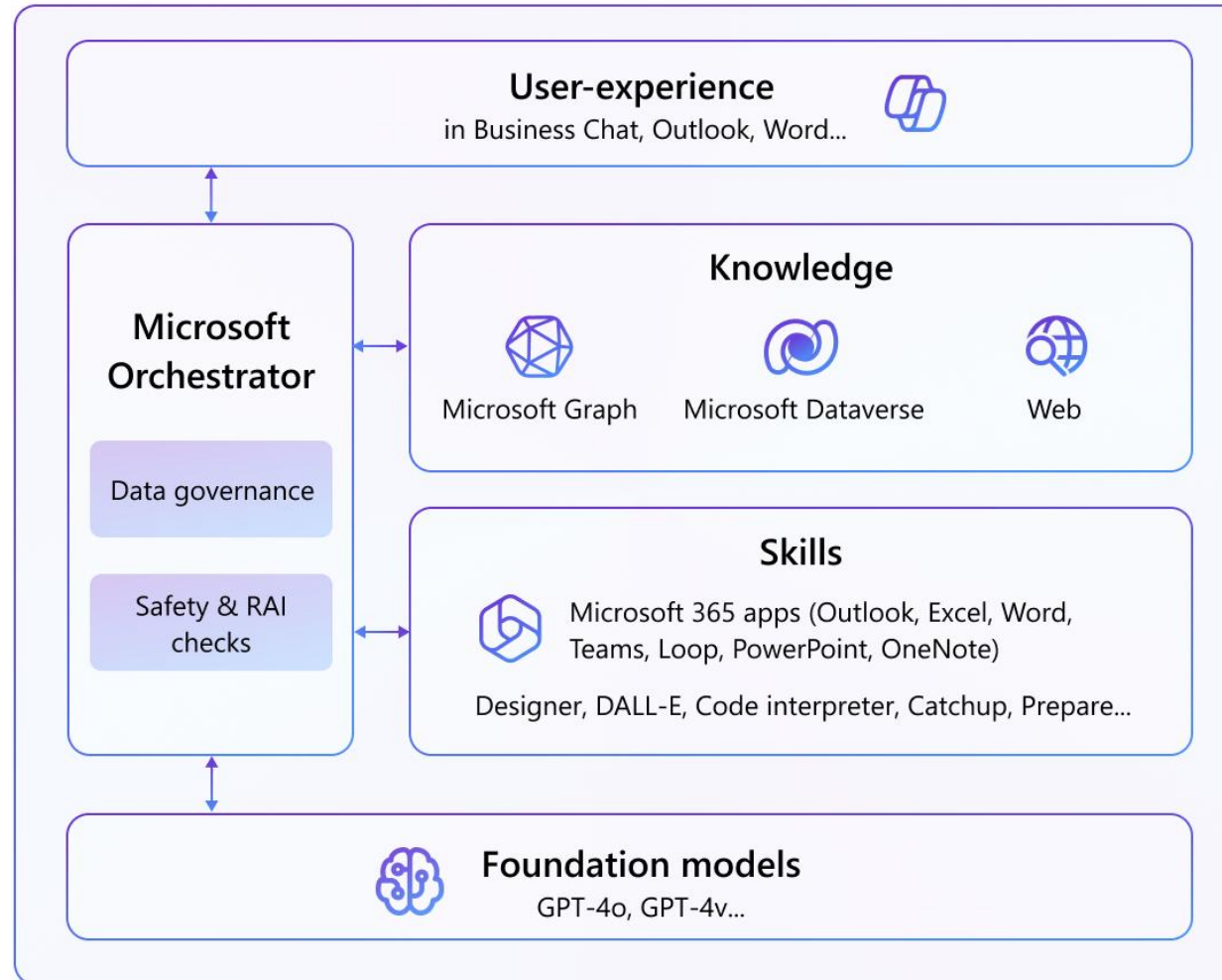
Agents

Copilot Control System

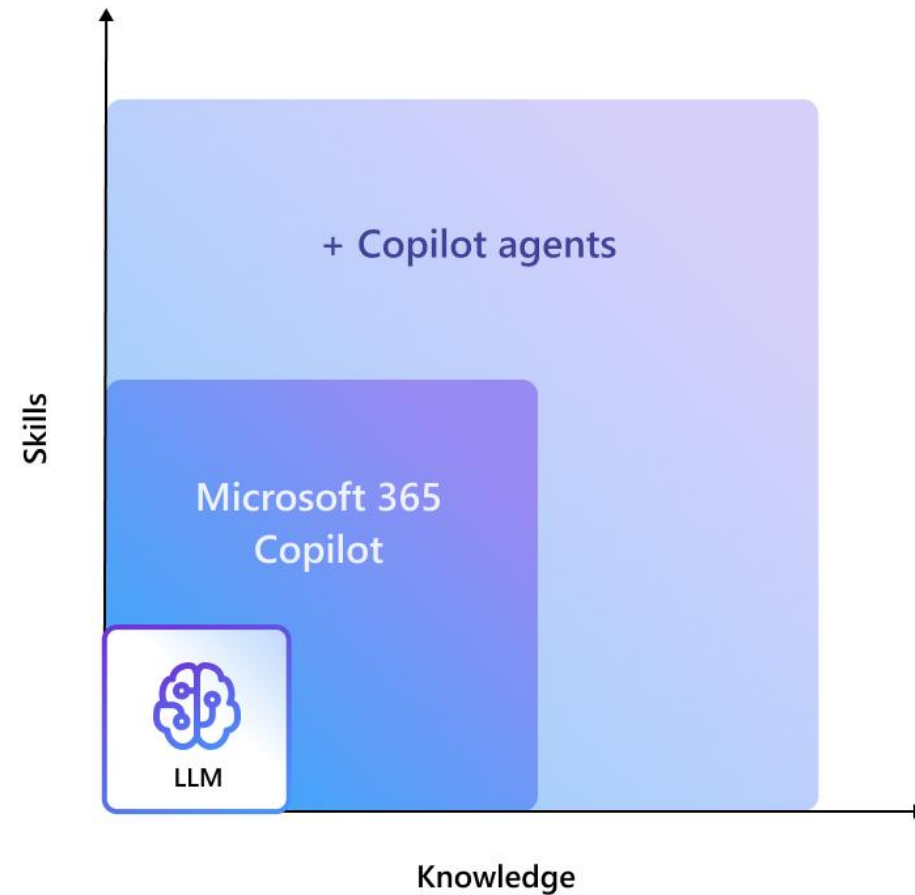
Copilot Analytics

Extending Microsoft 365 Copilot

Anatomy of
Microsoft 365
Copilot

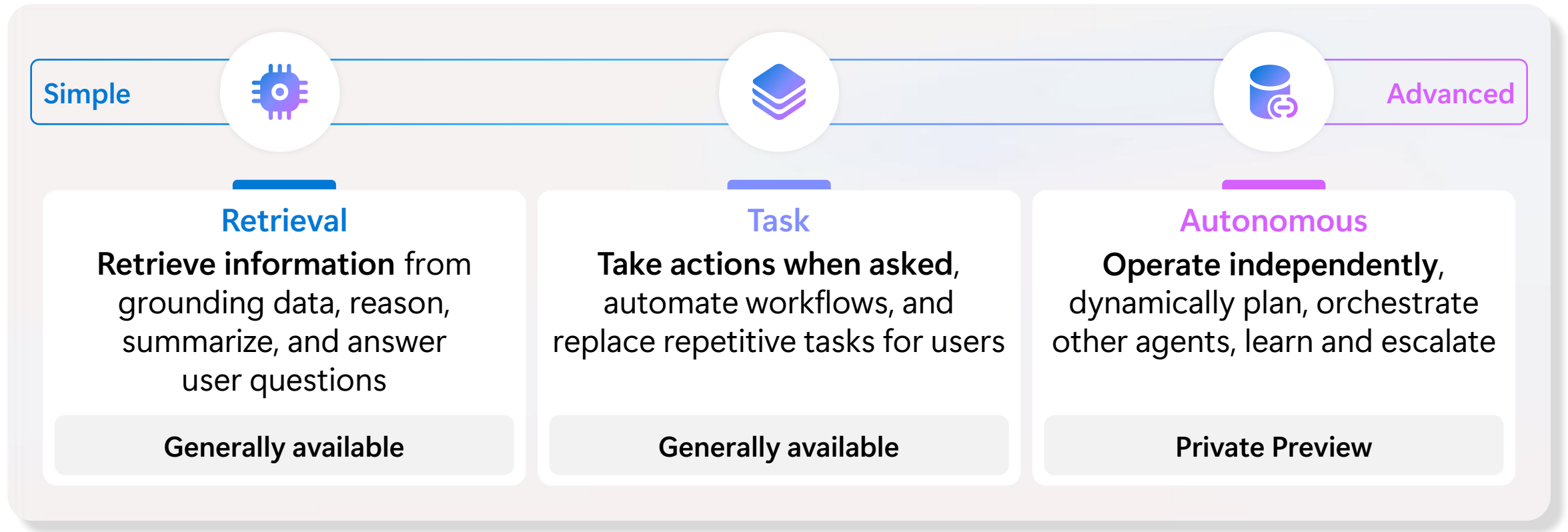


Extending Microsoft 365 Copilot



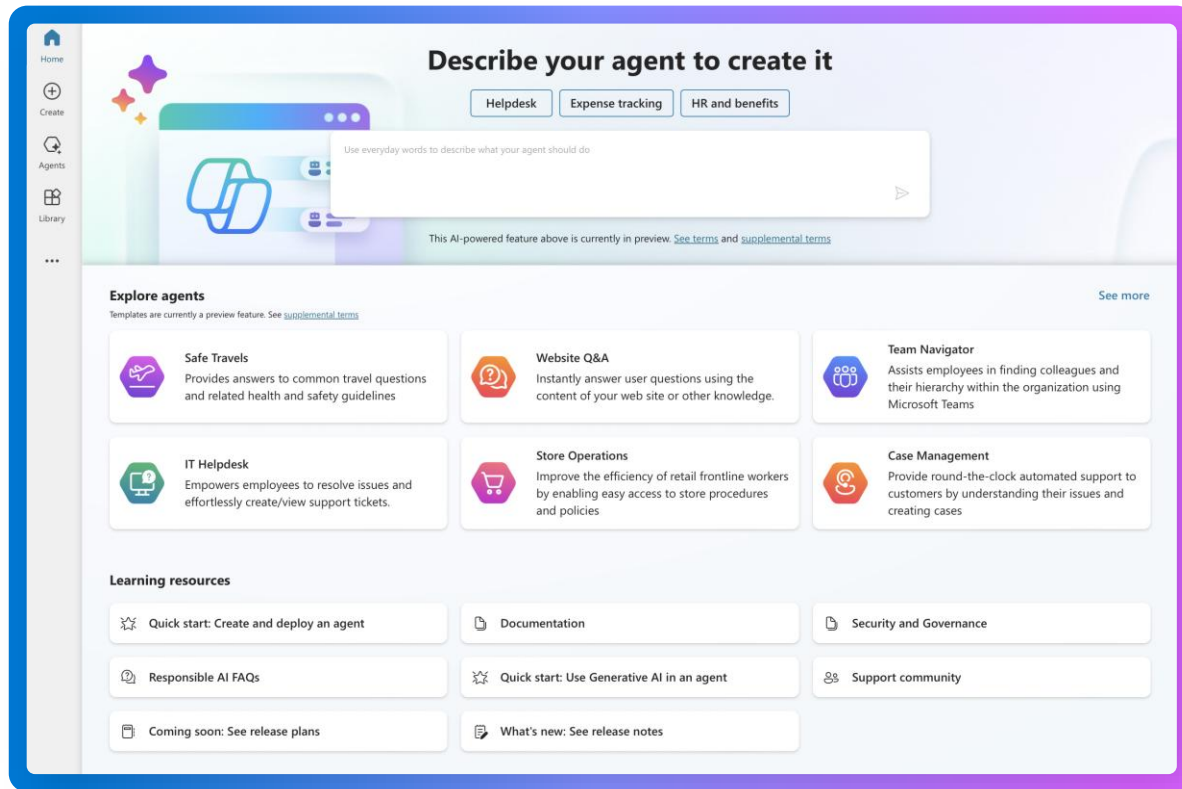
What are Copilot agents?

Agents expand Copilot's knowledge and skills or can operate autonomously to complete tasks or automate processes



Copilot agents vary in level of complexity and capabilities depending on your need

Agents in the workplace



According to Gartner®, "by 2028, **33% of enterprise software applications will include agentic AI**, up from less than 1% in 2024."

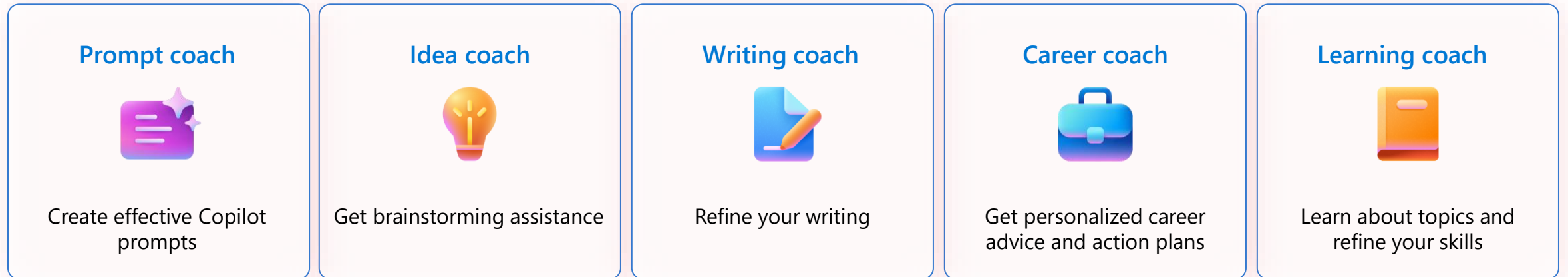
Gartner, Intelligent Agents in AI Really Can Work Alone. Here's How., Tom Coshov, October 1, 2024
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Automate tasks and processes with agents

Agents use AI to make Copilot Chat even more personalized and intelligent for your daily work. Agents automate repetitive tasks and processes – think of them like apps for Copilot. Copilot Chat comes with a set of agent templates to get started with, or you can create custom agents for your own needs¹.

Get started with agent templates by selecting “Get agents” in the right-side pane of Copilot Chat. Search for a specific template or browse the library.

Agents from Microsoft to try today:



Besides the agents from Microsoft, your organization may have created agents for you to use as well. You can view these in the “Built for your org” section in the agent library.

¹Agent creation is only available if your organization admin has enabled this capability.

Automate tasks and processes with agents

Create a custom agent by selecting “Create an agent” in the right-side pane of Copilot Chat¹. Describe what you’d like your agent to do or select “Configure” to further customize it. Creating an agent allows you to connect Copilot Chat to your organization’s shared data² to further unlock productivity – for example, you can connect the agent to a team SharePoint site and ask the agent questions about team documents.

Top ways to use custom agents:

Automate contract reviews



Create an agent to identify key clauses, ensure compliance with legal standards, assess potential risk, explain clauses, and summarize lengthy contracts.

Assist new hires with onboarding



Create an agent to greet new team members, assist them with technical issues, answer questions, and provide helpful resources.

Review resumes



Create an agent to analyze resumes stored in a SharePoint library, compare them with job criteria, score candidates, and answer questions about candidates.

Retrieve research materials



Create an agent that connects to a SharePoint link with research documents so you can quickly find relevant information.

Get answers about company policies



Create an agent to get answers about company policies such as time off, remote work, benefits, workplace conduct, and health and safety.

¹Agent creation is only available if your organization admin has enabled this capability.

²Shared data includes SharePoint files and data from your organization’s Microsoft Graph connectors. [Learn more about Microsoft Graph connectors.](#)

Agents in SharePoint



Ready-made or make your own

Use the ready-made agent or create a custom agent with specific SharePoint content



Easy to share

Just like other Microsoft 365 apps, share the link via email or Teams chat



Increase collaboration

Add to a Microsoft Teams chat and @mention the agent for instant interaction



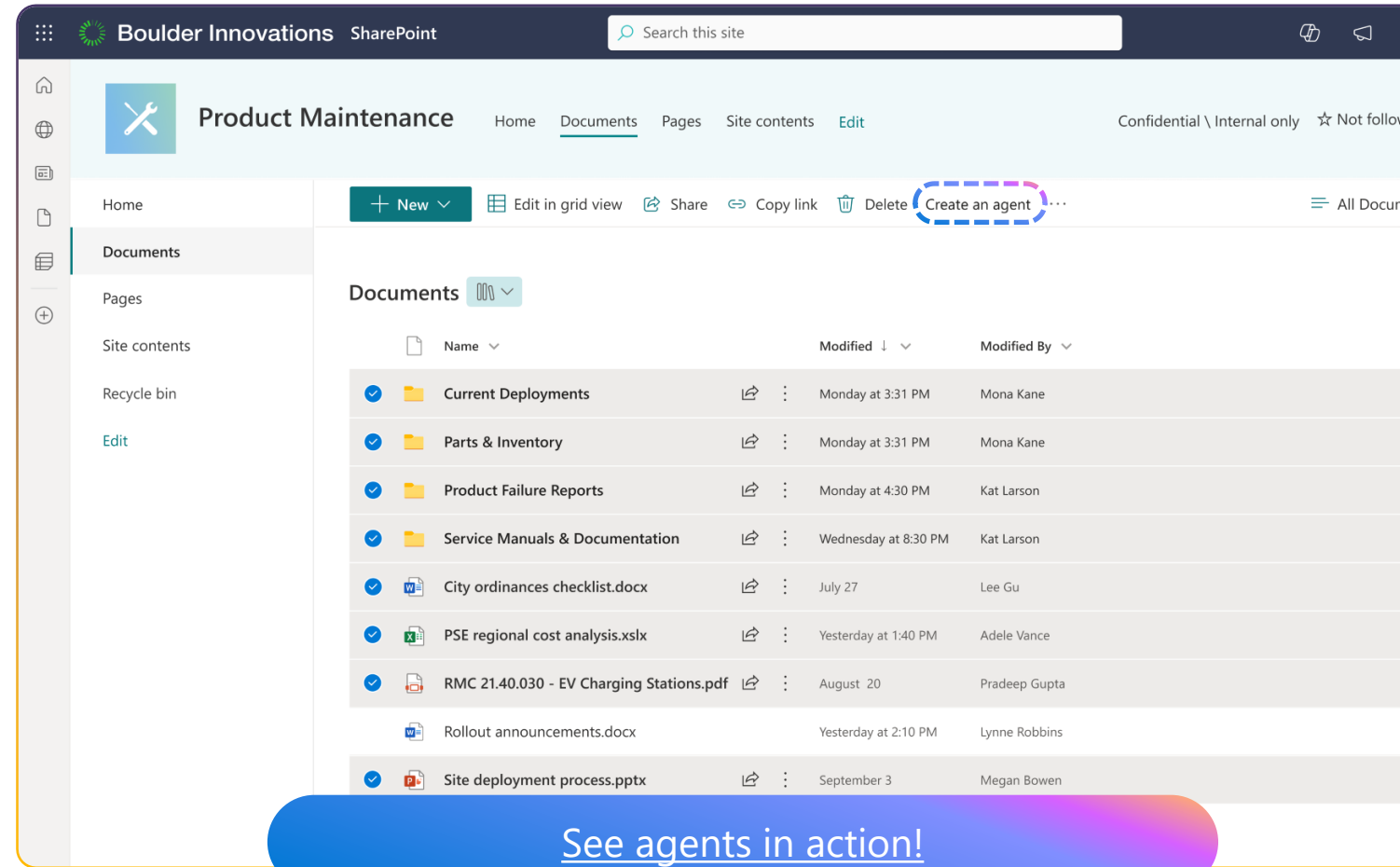
Extensible

Launch Microsoft Copilot Studio directly from SharePoint for deeper customizations



Secure

Defaults to your existing SharePoint permissions and sensitivity settings





Copilot Studio

Build your own custom copilots & agents

Enhance customer experiences by adding a copilot to your external website or other channels

Build an internal copilot outside of Microsoft Copilot to help employees with specific functions

Build with low code



with Copilot Studio
(standalone)

Customize Microsoft 365 Copilot

Use agents to customize Copilot to work with your unique business processes and data sources

Configure Copilot responses to specific questions

Build an agent









with Copilot Studio
(included in M365 Copilot)

Examples of agent templates in Copilot Chat



The simplest way to get started with agents. Once enabled by an admin, users can @mention the agent in Copilot Chat or open it directly by selecting it from the right-side pane.

Agent Name		Description
	Writing Coach	Provides detailed feedback on writing. Helps change the tone of messages, translates text, and assists in writing tasks
	Idea Coach	Helps users brainstorm and organize ideas
	Prompt Coach	Assists users in creating effective well-structured prompts for Copilot
	Career Coach	Provides personalized career development suggestions including role understanding, skill gap analysis, learning opportunities, and career transition plans
	Learning Coach	Helps users understand complex topics by breaking them down into simple, intermediate, and advanced summaries. Provides guided practice and learning plans
	Visual Creator	Assists users with creating images and videos