

Microsoft Copilot Agents

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Agents

What is an agent?

Agents are AI assistants that can help **optimize business processes** and **enhance productivity** using large language models and generative AI.

Publish to...

Your applications

Deploy agents to your website and other line of business applications



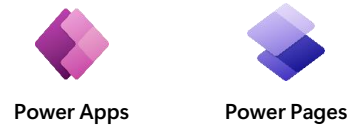
Microsoft 365 Copilot

Add agents that give Copilot focused knowledge and new skills



Power Platform

Extend Power Platform with agents that transform your low code solutions.

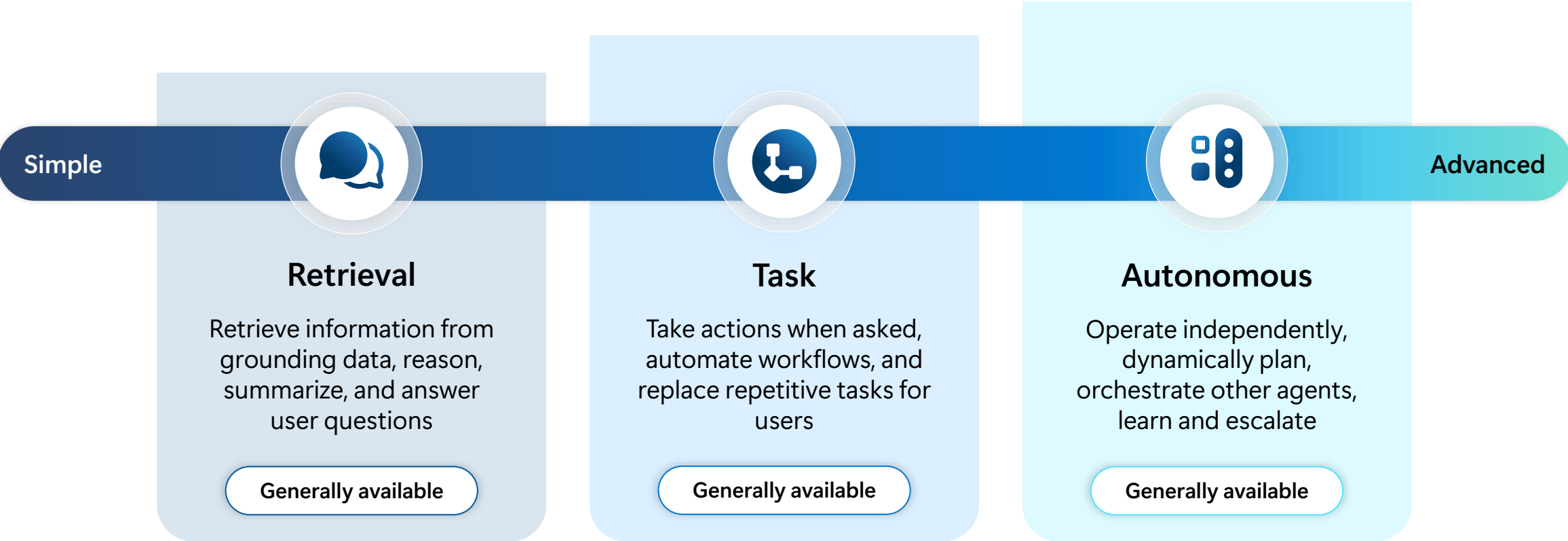


Dynamics 365

Build agents that integrate and improve business processes



Spectrum of agents



←.....Copilot agents vary in levels of complexity and capabilities depending on your need.....→

Explore a continuum of solutions

IT Helpdesk agent

How do I connect to the corporate network?



Device Refresh agent

Request a new laptop and send approvals via IT Service tool.



Lead Gen agent

The agent has identified and researched 15 new leads for you to review.



Simple



Advanced

Project Tracker agent

What is the status of phase 2 for project X and the remaining budget?



Budget Management agent

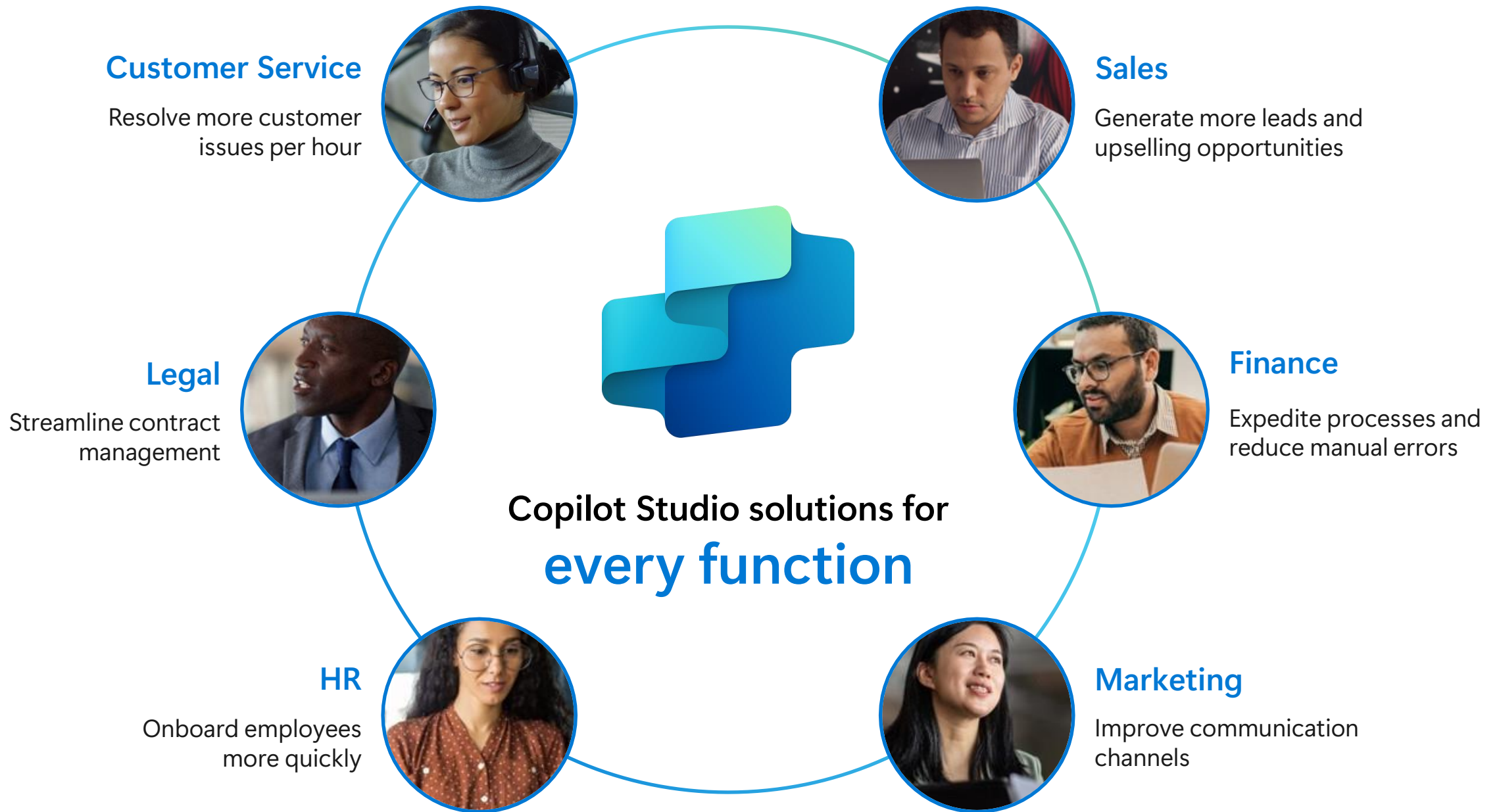
Review outstanding open PO's and begin financial planning.



Customer Support agent

The agent has identified new support issues and triaged to other agents.



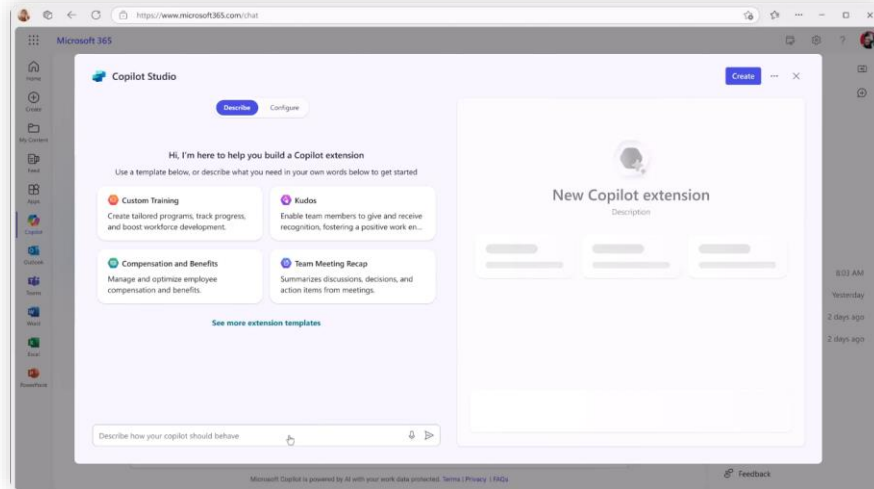




Copilot Studio

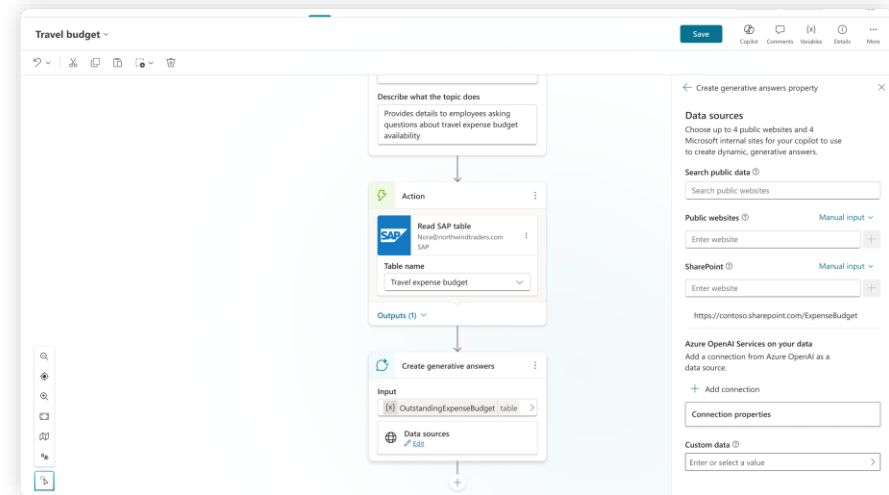
Copilot Studio is the platform **for AI makers.**

For end users



Agent Builder

For makers



Copilot Studio

Users can build and use simple agents in Agent Builder



Use a template

Mention (@) an existing agent template to get started

Agent templates:

[Writing Coach](#), [Idea Coach](#), [Prompt Coach](#),
[Career Coach](#), [Visual Creator](#),
[Learning Coach](#)



Build your own

Use Agent Builder to start creating your own agents

Agent possibilities:

[Onboarding Buddy](#), [Resume Reviewer](#),
[Contract/Legal Review](#), [Research Assistant](#),
[Policy Search](#)

Customize your agent

Easily tailor your agent's building blocks to meet your unique business needs in a comprehensive, end-to-end studio

Building blocks



Knowledge

Existing enterprise data in or outside of M365 that your agent can query



Actions

Tasks and processes your agent can perform across LOB services/apps



Logic

Defined conversation paths for your agent to follow when triggered

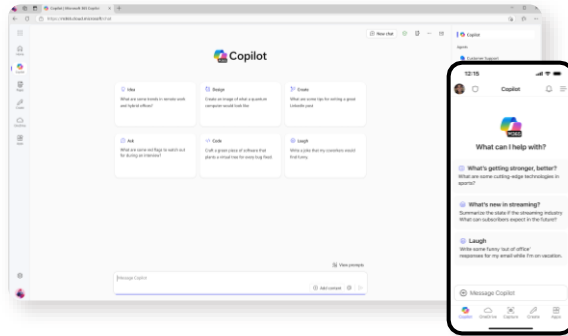


Channels

Where and how your end users engage with your agent



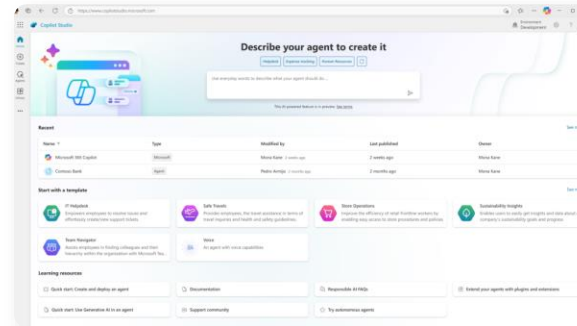
Microsoft 365 Copilot Chat



Chat

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

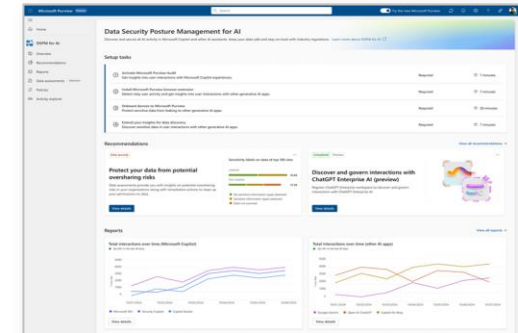
+



Agents

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

+



IT Controls

Enterprise Data Protection
and agent management

Secure M365 Copilot + Agents Implementation

The background features a large, white, stylized arrow pointing from the left towards the right. To the right of the arrow, there is a collection of abstract, overlapping geometric shapes in various colors including shades of blue, green, and purple. Some of these shapes have a grid pattern, suggesting a digital or technological theme. The overall composition is clean and modern.



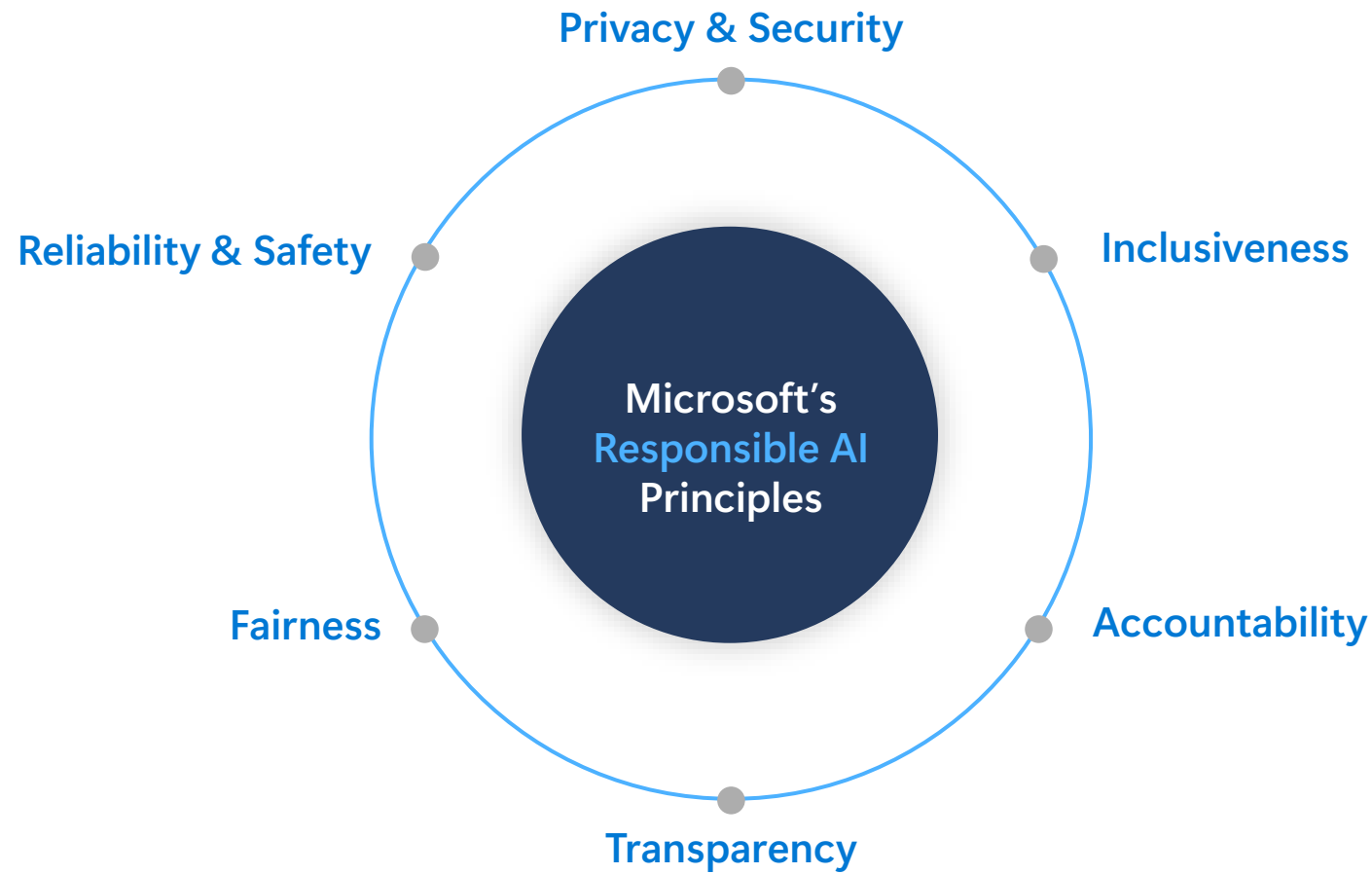
Microsoft Cloud runs on trust

Your data is **your** data

Your data from any fine-tuning
is **not** used to train the
foundation AI models

Your data is **protected** by
comprehensive enterprise
compliance and security
controls

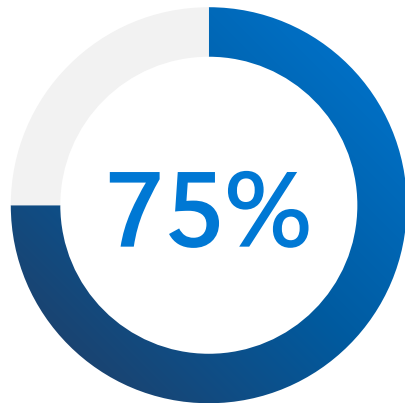
Microsoft's Responsible AI



Building blocks to enact principles

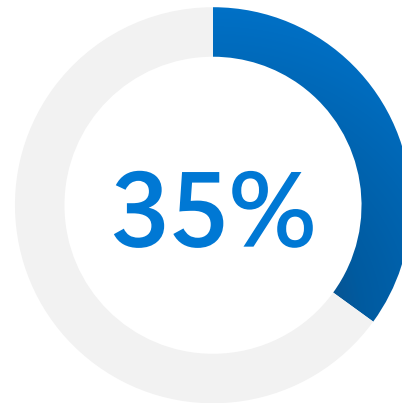


Enabling AI productivity while protecting organization data



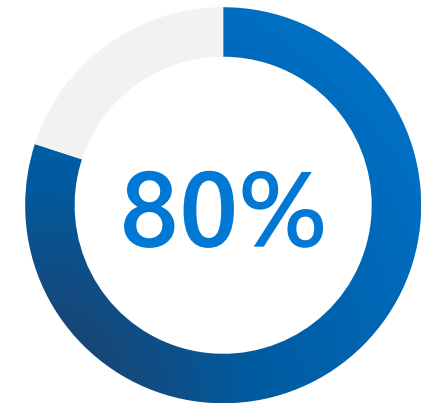
AI productivity expectations

75% of knowledge workers use AI at work today¹



Lack of controls to protect data shared in AI

35% of respondents are concerned about lack of tools to protect data that goes into generative AI²



Integrated security platform

80% agree that a comprehensive security platform with integrated solutions is superior to using multiple best-of-breed solutions that have to be manually integrated and managed³

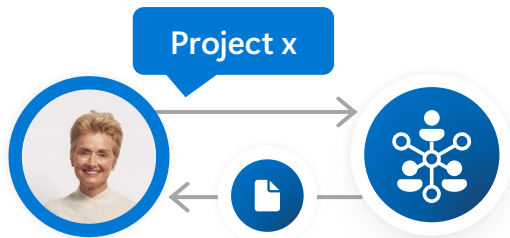
1. [Work Trend Index](#), commissioned by Microsoft
2. Survey of 658 data security professionals, Mar 2023, commissioned by Microsoft
3. [Data Security Index](#) report, Oct 2023, commissioned by Microsoft

Security and compliance challenges

1

Data oversharing

Users may access sensitive data via AI apps they're not authorized to view or edit



2

Data leak

Users may inadvertently leak sensitive data to AI apps



3

Non-compliance usage

Users use AI apps to generate unethical or other high-risk content



Common causes of Copilot oversharing in SharePoint

Privacy settings

Public - anyone in the organization can access this site

Public - anyone in the organization can access this site

Private - only members can access this site

Site privacy set to public

Share "Branding Elements.pptx"

Add a name, group, or email

Add a message

People in Contoso with the link can edit.

Copy link

Send

Link copied. People in Contoso with the link can edit.

Default sharing option is everyone

m365x32957528.sharepoint.com says

You are about to create unique permissions for this document library. Changes made to the parent site permissions will no longer affect this document library.

OK

Cancel

Broken permission inheritance

Share site

Add users, Microsoft 365 Groups, or security groups to give them access to the site.

Note that this site is part of a Microsoft 365 Group. If you add users here, they will be given access to the site, but not to other group resources such as calendars and conversations. To do that, [add members to the group](#) instead.

everyone

Everyone except external users

Search Directory

Use of "everyone except external users" domain group

Documents

Name	Sensitivity
Branding Elements.pptx	
Cross Cultural Marketing Campaigns.pptx	Confidential
DG-1000 Product Overview.pptx	
DG-2000 Product Overview.docx	Confidential
DG-2000 Product Pitch.pptx	
DG-2000 Product Specification.docx	
International Marketing Campaigns.docx	

Sites and files without sensitivity labels

Securing Your Copilot Deployment

Build trust and protect data by applying layered security across your Copilot deployment.

1

Identity & Access Management:

MFA, Conditional Access



2

Monitoring & Compliance:

Audit Logs, DSPM Insights



3

Data Access & Oversharing Prevention:

SharePoint access, RSS, Info Barriers



4

Information Protection:

Sensitivity Labels, DLP, Retention Policies



Copilot is only as secure as the environment around it – these controls ensure it's ready for real-world use.



Revoke Access to Copilot from Noncompliant Devices

Protect Copilot Access at the Device Level

- Block Microsoft 365 Copilot access on unmanaged or noncompliant devices using Intune and Conditional Access.
- Ensures that only secure, trusted devices can interact with Copilot and sensitive content.

Enforce Zero Trust at the Device Layer

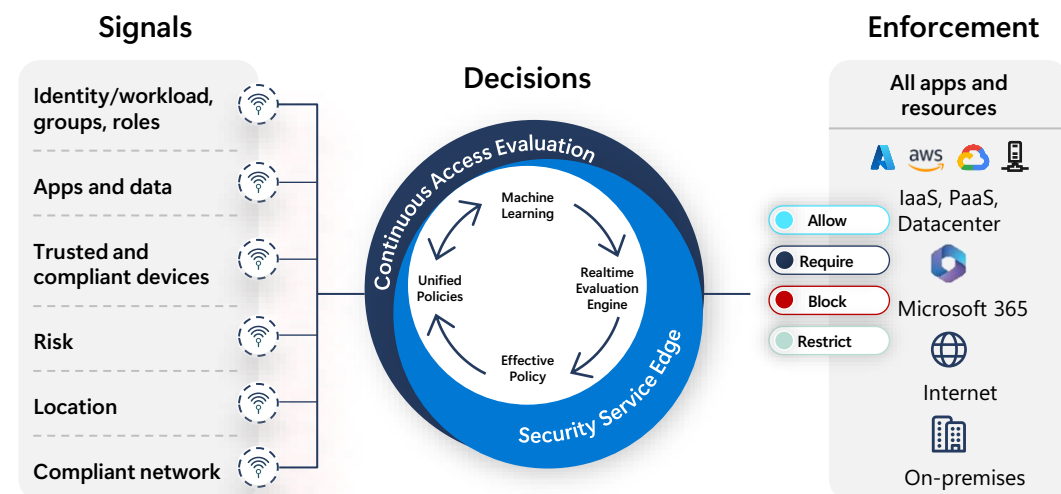
- Prevents Copilot from running on unprotected or outdated devices
- Reduces risk of data leakage or unauthorized access
- Supports a Zero Trust device model



Use device compliance policies to ensure Copilot is only accessible on **managed, up-to-date, and secure endpoints**.

How to apply:

1. In **Microsoft Intune**, define your **device compliance policies**
2. Go to **Microsoft Entra Admin Center > Conditional Access**
3. Create a policy targeting Copilot users
4. Set condition: **Require device to be marked as compliant**
5. Enable and monitor enforcement



Microsoft Purview Audit captures Copilot usage across M365 apps, including:

- **Prompt usage**
- **File or content accessed**
- **User interaction history** across Word, Excel, Outlook, Teams, and Copilot Chat

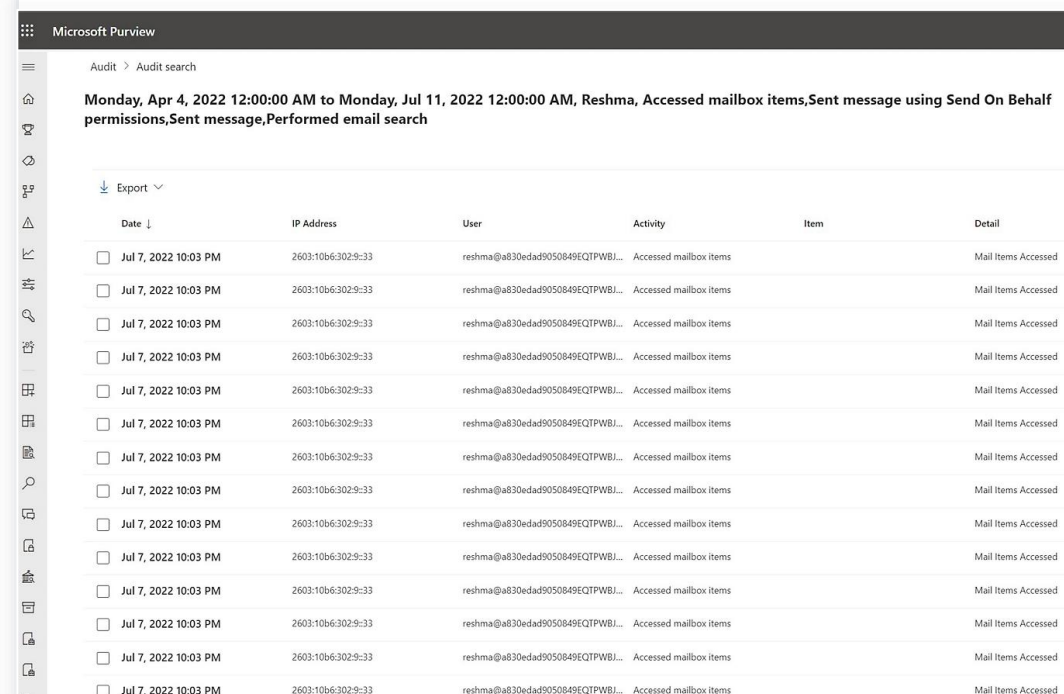
This allows admins to investigate activity, meet compliance needs, and monitor AI usage.

Why It Matters

- Enables visibility into who is using Copilot and what it's accessing
- Helps organizations meet compliance and auditing standards
- Supports incident response, especially for content or data misuse via Copilot

How to apply:

1. Go to **Microsoft Purview > Audit**
2. Ensure **Audit logging** is enabled (Standard or Premium tier)
3. Search for **Copilot activity**
4. Filter by **workload, user, or timeframe**
5. Run reports regularly or configure alerts as needed



Securing Your Agent Deployment

Apply layered security to protect custom agents



Identity & Access Management

End-user authentication, access controls

Secure who can interact with agents



Monitor & Compliance

Audit logs, activity tracking

Know who accessed agents and when



Data Access & Oversharing

Power Platform DLP, Environment strategy

Control where agents run and how they use connectors



Information Protection

DLP policies, retention rules

Protect agent interactions and data flow

Ensure your agents are only accessible by the right users, with the right policies in place.



Agent management

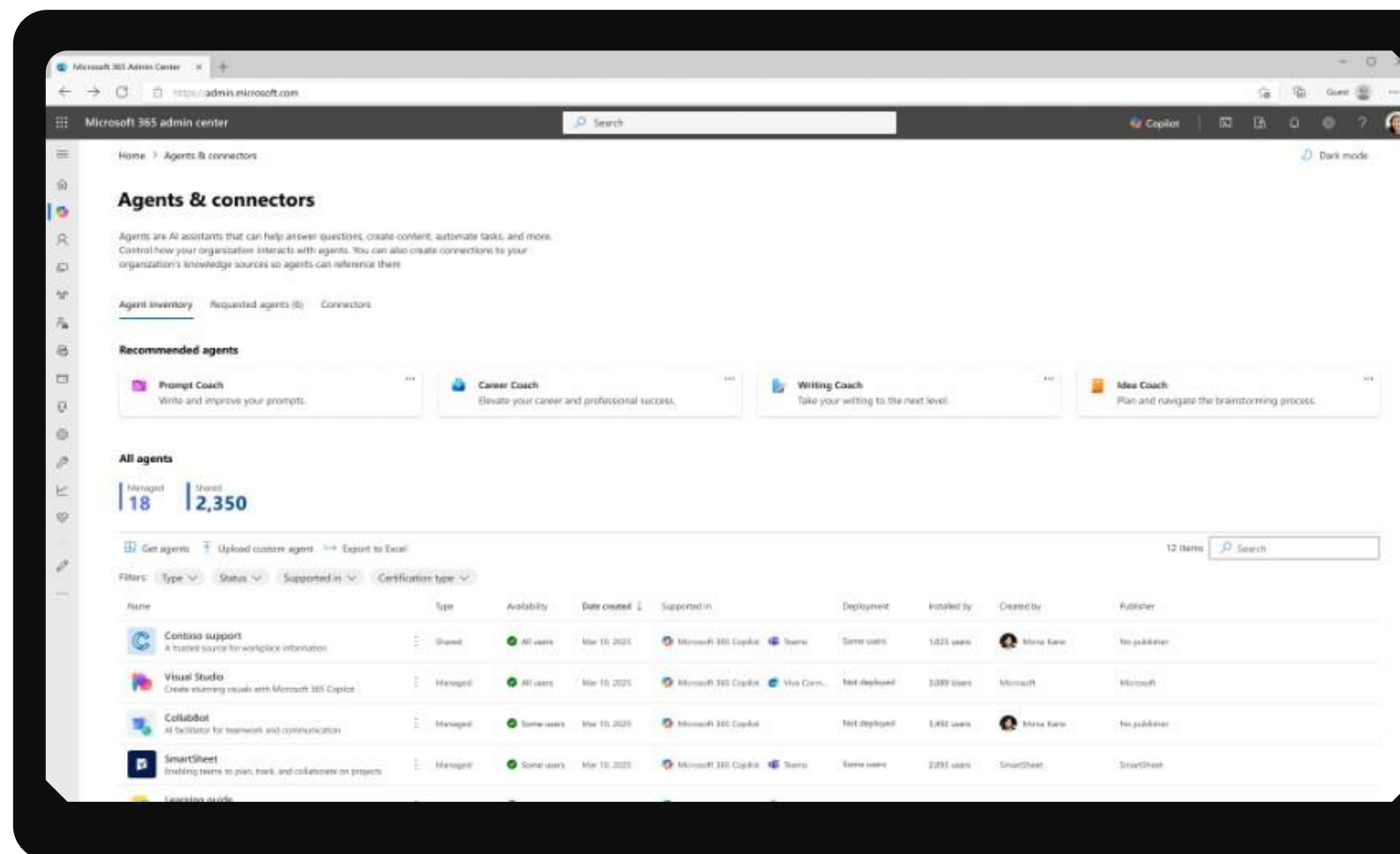
Built for AI admins, designed for scale

Agent Inventory & Metadata: View all agents—store, Microsoft, external, and shared—with rich metadata like capabilities, data sources, and custom actions.

Access Controls: Scope agent availability by user or group, block or delete agents, and manage ownerless agents to ensure continuity.

Lifecycle Management: Transfer ownership, monitor usage, and enforce governance policies across the agent spectrum—from end-user-created to IT-managed agents.

Staged Rollouts: Control agent visibility and deployment pace across the organization.



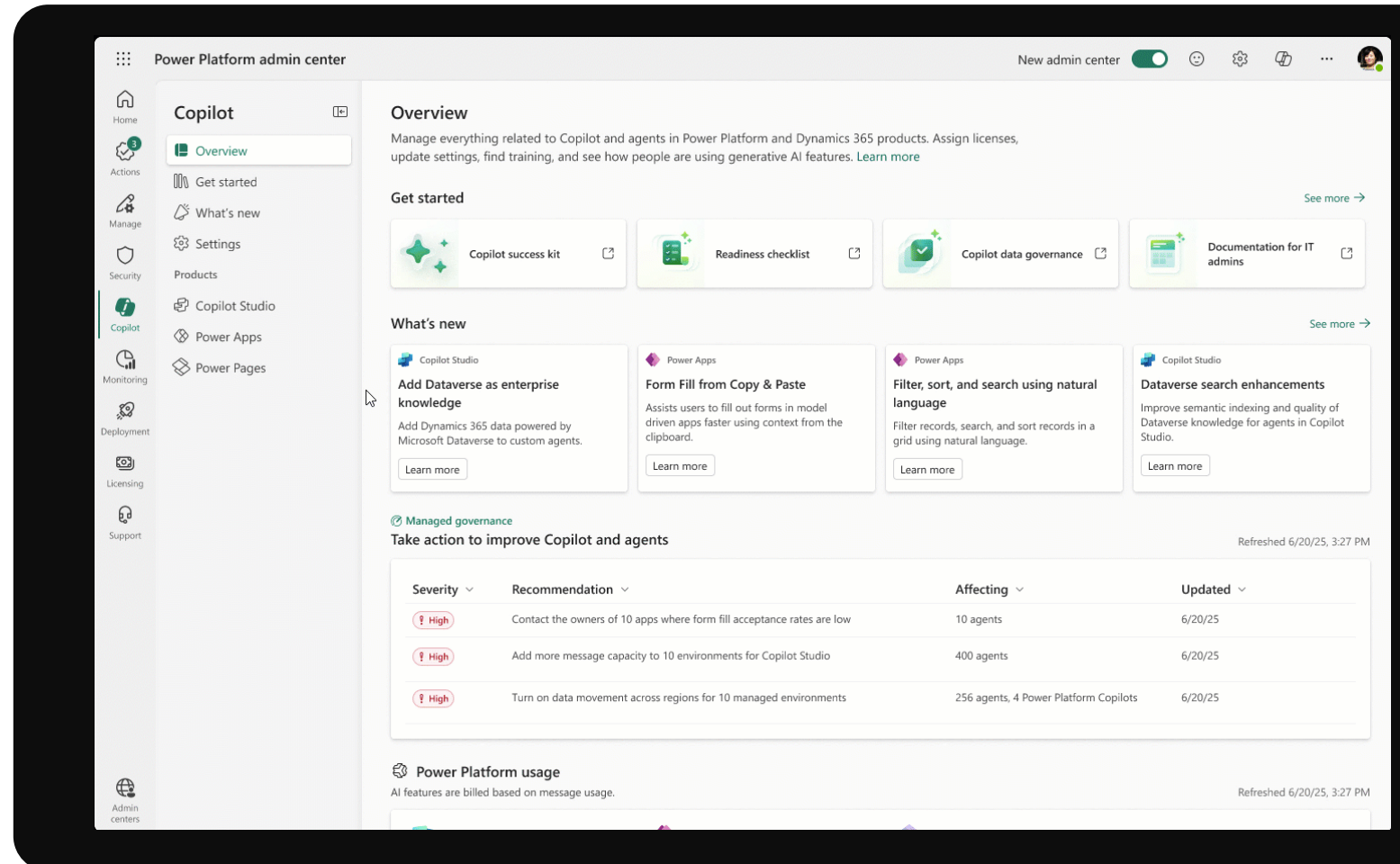
Copilot hub

Command center for scalable, secure agent adoption

Governance Controls: Configure data policies, permissions, and sharing settings to manage risk at scale.

Centralized Visibility: Track agent usage, cost, and adoption trends across your organization.

Innovation Planning: Stay ahead with visibility into upcoming features.





Track Agent Activity with Microsoft Purview Audit Logs

Monitor Agent Interactions

- Tracks agent launches, user interactions, and conversation events
- Helps identify unusual access or usage patterns
- Supports compliance and zero-trust visibility

Applies to:

- Agents deployed in Teams, Power Pages, or custom apps
- Admins with Audit (Standard or Premium) in Microsoft Purview

How to apply:



1. Go to **Microsoft Purview > Audit**
2. Enable audit logging (Standard or Premium)
3. Search for **Copilot Studio agent events** (e.g., "AgentStarted", "ConversationEnded")
4. Export logs or set up scheduled reviews

Search

Searches completed
1

Active searches
0

Active unfiltered searches
0

Date and time range (UTC) *

Start Jan 13 00:00

End Jan 14 00:00

Keyword Search

Enter the keyword to search for

Admin Units

Choose which Admin Units to search for

Search

Clear all

Activities - friendly names

Interacted with Copilot

Interact

Copilot activities

☒ Interacted with Copilot

M365 Apps Admin Services cloud policy acti

☐ Created policy configuration

☐ Updated policy configuration

☐ Deleted policy configuration



Auditing is critical for securing production agents and meeting internal compliance or customer commitments

Leverage M365 Copilot Promos!

Microsoft 365 Copilot

- 15% off promo
- Annual Term | Annual or Monthly Bill
- New M365 Copilot customers with qualified pre-req SKUs
- Min. 10 seat, max of 2,400 seats
- Duration: 10.1.25 through 12.31.25

[Copilot Getting Started promo FAQ](#)

M365 E5 Compliance

- 50% off PUPM for M365 Copilot enabled users
- Must have M365 Copilot, as well as prereq SKUs
- Prerequisite licensing (M365 E3 or O365 E3 and (EMS) E3)
- Term | Annual or Monthly Bill
- Duration: 2.1.25 through 2.1.26

[E5 Compliance for M365 Copilot Promo FAQ](#)

Lab Registration

Registration Link



TD SYNnex

Microsoft

Hands-on Lab Registration

Agentic AI | Inspire 2025

Please complete the registration form to help us assess your current understanding of Agentic AI concepts. This will enable us to recommend the most suitable hands-on lab experience, where you can practice and gain practical exposure to Agentic AI concepts using Copilot Studio.

When you join this meeting, your name, email address and/or phone number may be viewable by other session participants in the attendee list. By joining, you're agreeing to this experience.

When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself.

When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself.

* Required

1. First Name

Enter your answer

2. Last name

Enter your answer

3. Organization Name

Enter your answer

4. Email address (work email only) *

Please enter an email

5. Proficiency Level (for Lab Allocation) *

Please select the option that best matches your proficiency level. The respective lab environment will be allocated accordingly.

Beginner to Intermediate | Store Operations with Microsoft Copilot Studio

Intermediate to Advance | Leave Management Agent with Microsoft Copilot Studio

You can print a copy of your answer after you submit

Submit

Never give out your password. [Report abuse](#)

Microsoft 365

This content is created by the owner of the form. The data you submit will be sent to the form owner. Microsoft is not responsible for the privacy or security practices of its customers, including those of this form owner. Never give out your password.

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Before you start the lab



[Official Microsoft Copilot Studio documentation - Microsoft Copilot Studio | Microsoft Learn](#)



[Knowledge sources overview - Microsoft Copilot Studio | Microsoft Learn](#)



[Add actions to custom agents - Microsoft Copilot Studio | Microsoft Learn](#)

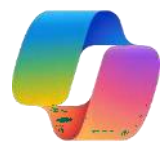


[Connect and configure an agent for Teams and Microsoft 365 Copilot - Microsoft Copilot Studio | Microsoft Learn](#)



Thank you

Resources



The Extended Copilot Family

Azure & AI

Copilot

OpenAI



Power
Platform



D365



M365



Security



Window



Bing



GitHub



Azure OpenAI
Service



Cognitive
Services

Not available in CSP



For Individuals

Copilot

Free

Copilot Pro

\$20

Foundational Capabilities



Web Grounding



Commercial Data Protection



Priority Model Access



Copilot in Outlook, Word, Excel, PowerPoint, and OneNote



Copilot in Teams



Microsoft Graph Grounding



Enterprise-Grade Data Protection



Customization

Copilot GPT
Builder



For Organizations

Copilot

Free

Copilot for
Microsoft 365

\$30



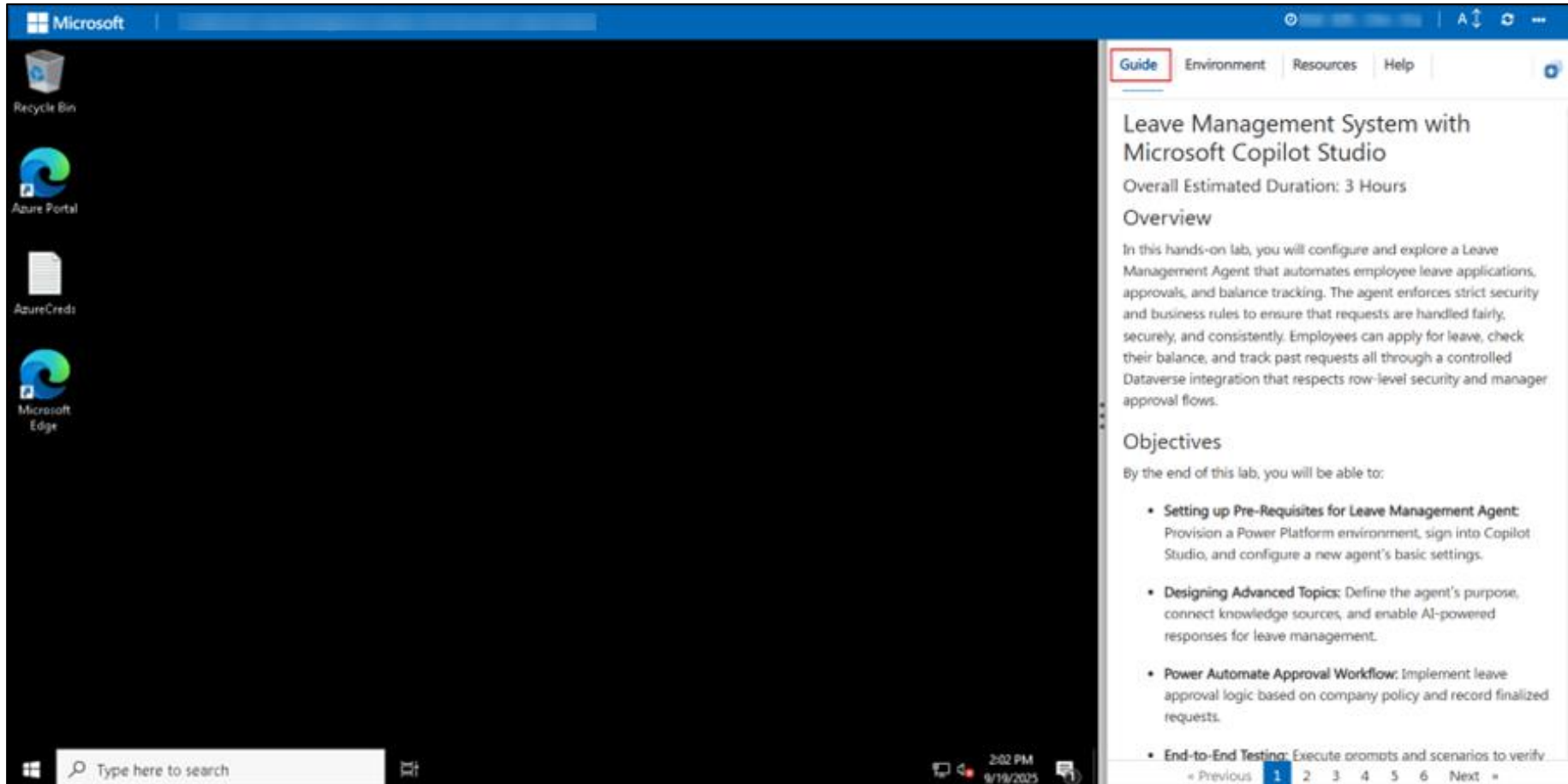
Copilot
Studio

Commercial Data Protection applies when users are signed into their work account using their organization's Entra ID.

		● Included ▲ Included — Metered		Microsoft 365 Copilot Chat	Microsoft 365 Copilot
				Free + Consumption	\$30 pupm
Chat	Copilot Chat – Web grounded (powered by GPT-4o)			●	●
	Copilot Chat – Work grounded (work data in your tenant’s Microsoft Graph and 3rd party data via Graph connectors)				●
	Copilot Pages			●	●
	File upload ¹			●	●
	Code Interpreter ¹			●	●
	Image generation ¹			●	●
Agents ²	Create agents using Copilot Studio ³ , agent builder, and SharePoint			●	●
	Discover and pin agents			●	●
	Use agents grounded in Web data			●	●
	Use agents grounded in work data, including SharePoint agents (work data in your tenant’s Microsoft Graph and 3rd party data via Graph connectors)			▲	●
	Use agents that act independently using autonomous actions			▲	▲
Personal assistant	Copilot reasons over personal work data (e.g. Outlook, OneDrive, Teams meeting transcripts and chats)				●
	Copilot in Teams (Copilot in Meetings and Meeting Recap, insights from screen-shared content coming soon)				●
	Copilot in Outlook (Prioritize my inbox, schedule focus time and 1:1 meetings, draft agendas, summarize message threads)				●
	Copilot in Word (Suggestions for structure, flow, and tone, draft and summarize documents)				●
	Copilot in Excel (Python, getting started experience, create formulas and visualizations using natural language)				●
	Copilot in PowerPoint (Narrative builder, presentation translation, generate slides or images aligned to company branding)				●
	Copilot Actions				In preview
	Pre-built M365 agents (Interpreter, Facilitator, Project Manager, Employee Self-Service)				In preview
Copilot Control System	Enterprise Data Protection (EDP)			●	●
	IT management controls			●	●
	Agent management			●	●
	SharePoint Advanced Management				●
	Copilot Analytics to measure usage and adoption ⁴				●
	Pre-built reports and advanced analytics to measure ROI				●

Lab Overview

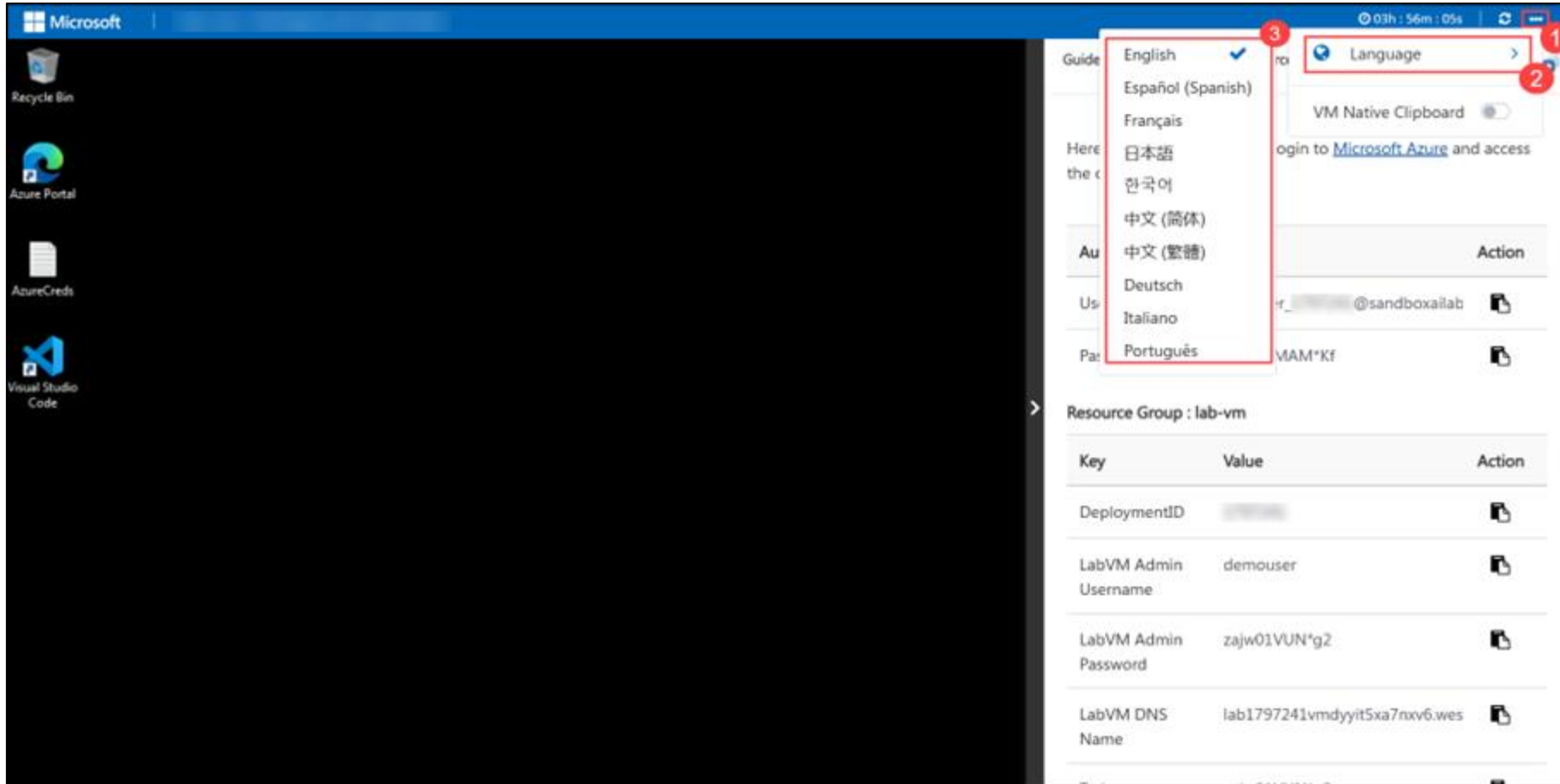
Lab Instructions (1/4)



Steps:

- Upon launching your guided lab environment, a Virtual machine will appear on the left and the lab guide will appear on the right.
- The lab will be active for 3 hours from the time of launch. Please complete the lab within this duration, as the lab environment will be automatically deleted once the time expires.
- Throughout the lab, **follow the instructions** provided in the lab guide.

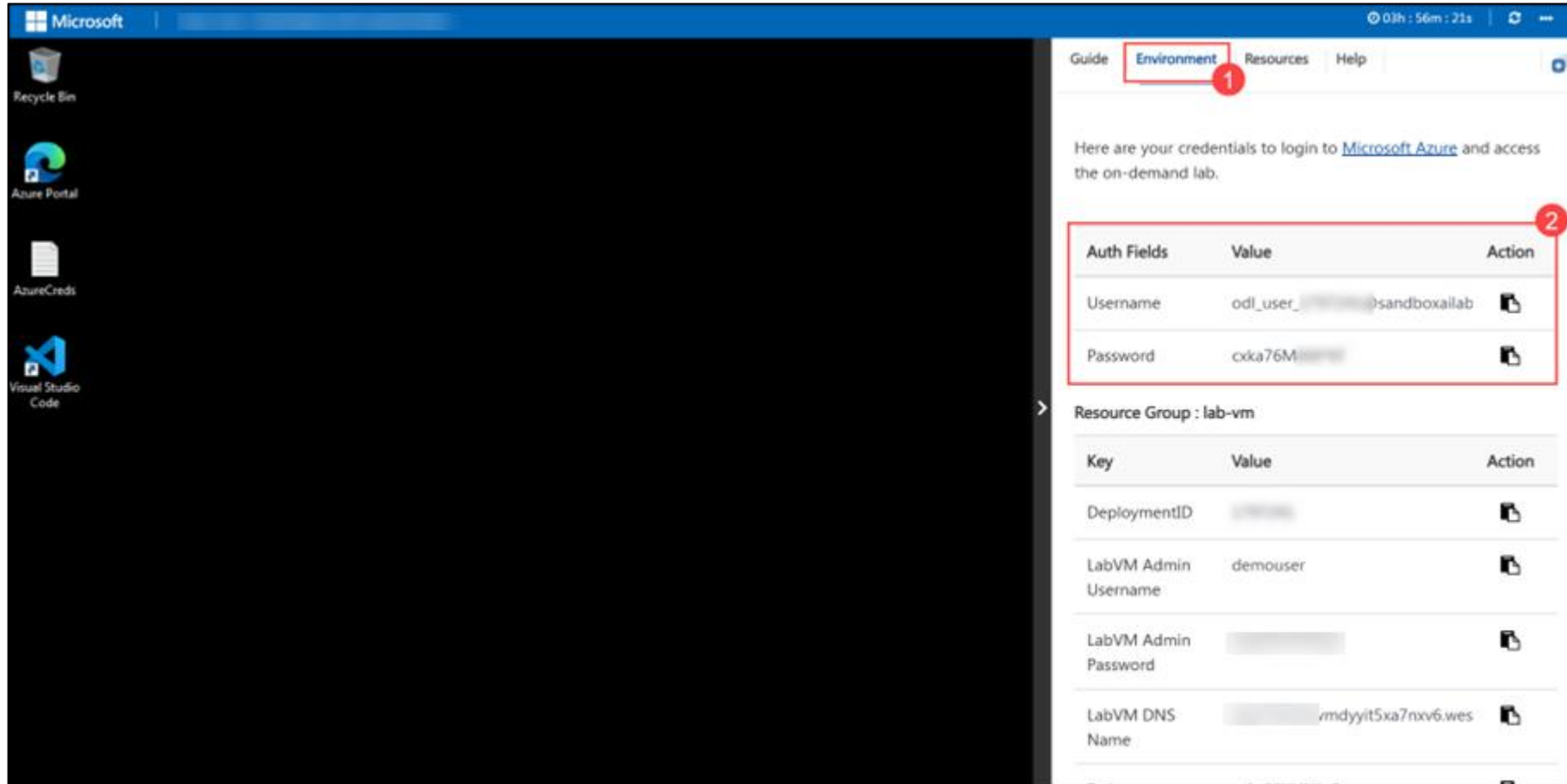
Lab Instructions (2/4)



Steps:

- To change the language to your preferred one, click on the **ellipse (1)** button, select **Language (2)**, and choose your desired language from the **list (3)**., **follow the instructions** provided in the lab guide.

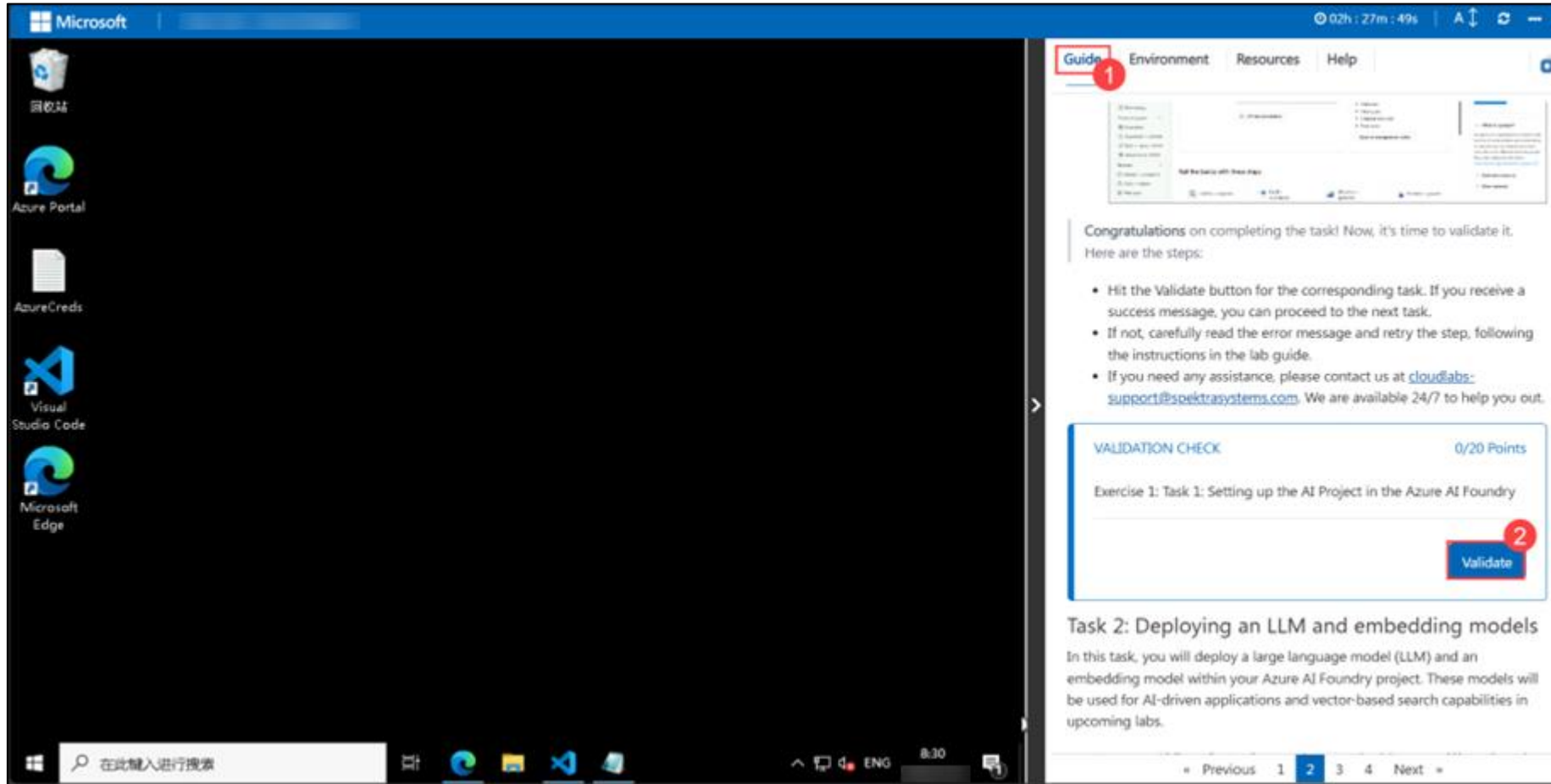
Lab Instructions (3/4)



Steps:

- Select the **Environment (1)** tab.
- Login to the Azure portal using the **Username** and **Password(2)** provided in the **Environment** tab.

Lab Instructions (4/4)



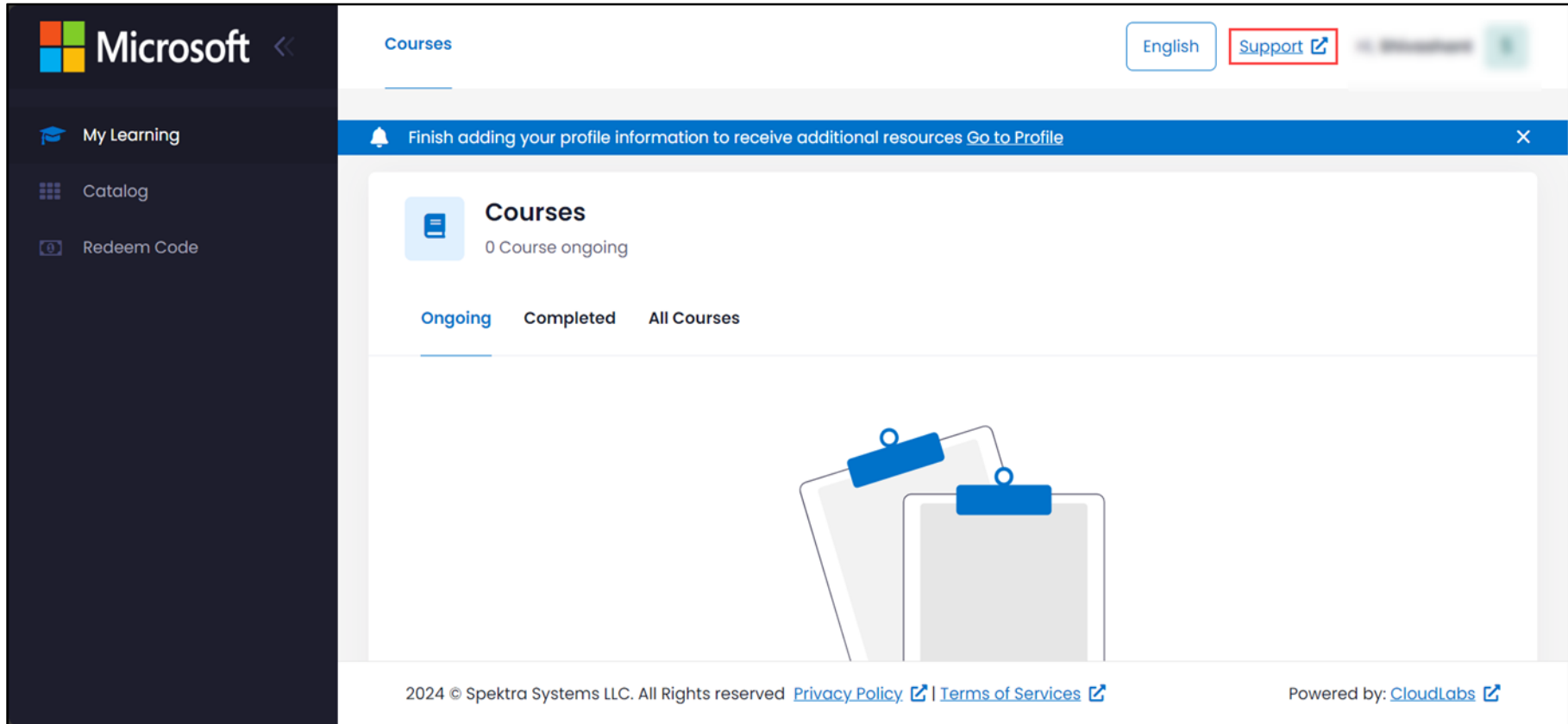
The screenshot shows a Windows desktop environment. On the left, the taskbar includes icons for the Recycle Bin, Azure Portal, AzureCreds, Visual Studio Code, and Microsoft Edge. The main window displays a lab guide application. The application has a blue header with the Microsoft logo and a navigation bar with tabs: Guide, Environment, Resources, and Help. The 'Guide' tab is active, showing a list of tasks on the left and a detailed view on the right. The detailed view includes a 'Congratulations' message, a list of steps, and a 'VALIDATION CHECK' section. The 'VALIDATION CHECK' section shows 'Exercise 1: Task 1: Setting up the AI Project in the Azure AI Foundry' with a 'Validate' button. Below this, 'Task 2: Deploying an LLM and embedding models' is described. The bottom of the application shows a progress bar with steps 1, 2, 3, and 4, where step 2 is currently selected.

Steps:

- While following the instructions, you will come across validation steps to confirm the actions you've performed.
- Please click the **Validate** button at these points. If the validation is successful, proceed to the next step. If it fails, review what may have been missed, correct it, and try validating again.
- Validations are mandatory**, as each successful validation contributes to your overall earned points.

Support Links

Support Information



Steps:

- Click on the **Support icon** after signing in successfully for any concerns or queries.
- Contact **Support** in case of additional queries or concerns cloudlabs-support@spektrasystems.com.

Quick Tips

Copy-Paste Issue:

- If copy paste doesn't work from lab guide to the Virtual Machine (VM), please try the workaround given on below URL.
- [Copy Paste | CloudLabs Documentation](#)

RDP over HTTP Issue:

- In case of RDP over HTTP is not working and you are not able to access the virtual machine please refer the below URL
- [RDP: Known Functionality Issues | CloudLabs Documentation](#)

Add Safe Sender:

- Intermittently, emails sent from CloudLabs Support are received into junk/Spam folders, please refer below URL on how to resolve this issue. [Add Safe Sender | CloudLabs Documentation](#)

Knowledge



Add your **public and enterprise data** sources using agent connectors.



Your agent will be able to **dynamically generate multi-turn answers** in real time using your enterprise data.



Allows you to create an **immediately useful** agent.



Supported data sources include:

- Public websites
- Dataverse
- File uploads
- SharePoint/OneDrive
- Microsoft Fabric (coming soon)
- Microsoft Graph

Add available knowledge sources (Powered by Copilot connectors)

Users with edit permissions for this copilot can also reuse your connections for other topics within the copilot. [Manage security settings](#)

Keywords for the data you're looking for

Featured

Add existing knowledge
Converts previous data sources to knowledge for this copilot

Public website
Incorporate any relevant web content found on Bing

Files
Upload documents from your local computer

SharePoint and OneDrive
Securely integrate and manage internal data

Dataverse
Customize and deploy structured data tables

Microsoft Fabric
Accelerate data analysis with AI capabilities

Bring your enterprise data (16)

Enterprise website (preview)

Azure DevOps (preview)

Custom connector (preview)

Jira (preview)

ADLS Gen2 (preview)

Oracle SQL database (preview)

ServiceNow (preview)

File share (preview)

CSV (preview)

Microsoft SQL (preview)

MediaWiki (preview)

Salesforce (preview)

Confluence (preview)

Azure SQL (preview)

Zendesk (preview)

Power Platform connector

Actions

-  Easily connect to your key line of business systems.
-  Enable your agent to automate your business processes and complete tasks.
-  Tell your agent when to execute an action by adding autonomous triggers.

Types of actions	
Prebuilt connectors	Choose from 1400+ prebuilt Power Platform connectors to popular data sources and apps
Custom connectors	Create a custom connector for any publicly available API
Flows	Bring in automated workflows built using Power Automate
Prompts	Provide custom instructions to the GPT model using AI Builder
Skills	Add a bot built using Azure Bot Framework as a skill

Step 1 of 3: Choose an action

Create an action or browse through our list of actions you want to use to get information from external sources.

[Learn more](#)

Discover an action

Search for flows, skill actions, and commonly used connector actions

Search

11 actions found

Connectors Custom Connectors Flows Skills Dataservice



Untitled

Get information about industries, solutions, services and cont...



Run a flow built with Power Automate for desktop
Desktop flows



Delete a row

Excel Online (Business)



Run script

Excel Online (Business)



Get a row

Excel Online (Business)



Run script from SharePoint library

Excel Online (Business)

Cancel



1400+

Logic



Have **complete control over critical scenarios** by designing specific step-by step topics.



Enable your agent to **automatically select the most appropriate action or topic** to respond to a user using generative AI.



Easily mix and manage both **generative and custom dialog** in one system.



Connect to your contact center so your agent can escalate and hand off the conversation with full context to a live human agent.

The screenshot displays the 'Expense Budget Assistant' interface. The main workspace shows a workflow diagram for the 'Travel budget' topic. The workflow starts with a 'Describe what the topic does' box, followed by an 'Action' box labeled 'Read SAP table' with the table name 'Travel expense budget'. This leads to an 'Outputs (1)' box, which then connects to a 'Create generative answers' box. The 'Create generative answers' box has an input field containing '(X) OutstandingExpenseBudget table' and a 'Data sources' section with an 'Edit' link. On the right side, a 'Create generative answers property' panel is open, showing 'Data sources' with options for 'Search public data', 'Public websites', 'SharePoint', and 'Azure OpenAI Services on your data'. The 'Public websites' section includes a search bar and a list of websites. The 'SharePoint' section includes a search bar and a list of SharePoint sites. The 'Azure OpenAI Services on your data' section includes an 'Add connection' button and a 'Connection properties' field. The 'Custom data' section includes a search bar and a list of custom data items.

The end-to-end agent conversation



STAGE 1

Authored Topics

Organizations control their critical topics by designing their own specific processes and workflows.

STAGE 2

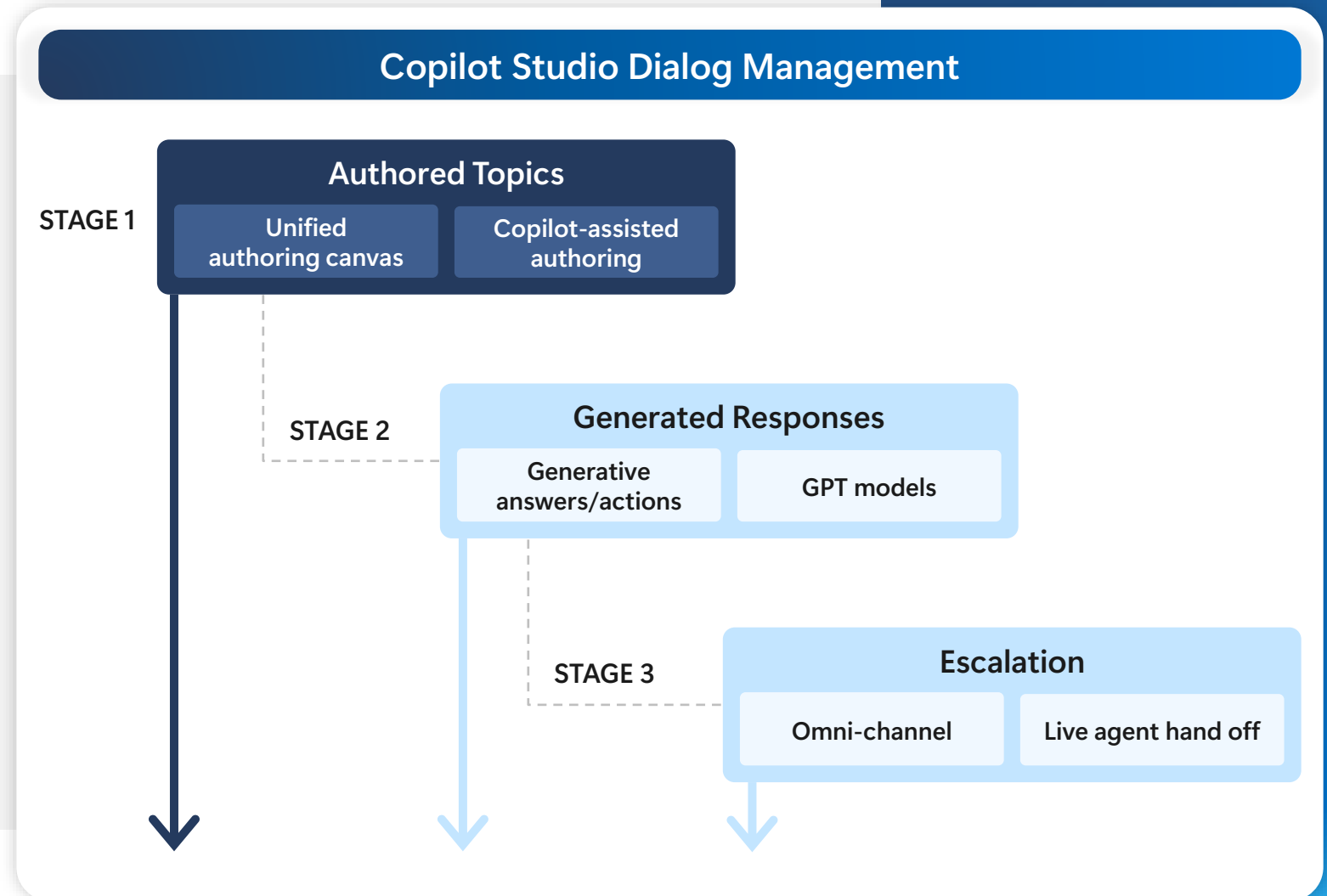
Generated Responses

Generative AI answers queries at scale that may be duplicative or less complex.

STAGE 3

Escalation

If the agent can't handle the conversation, it will escalate to a human agent.



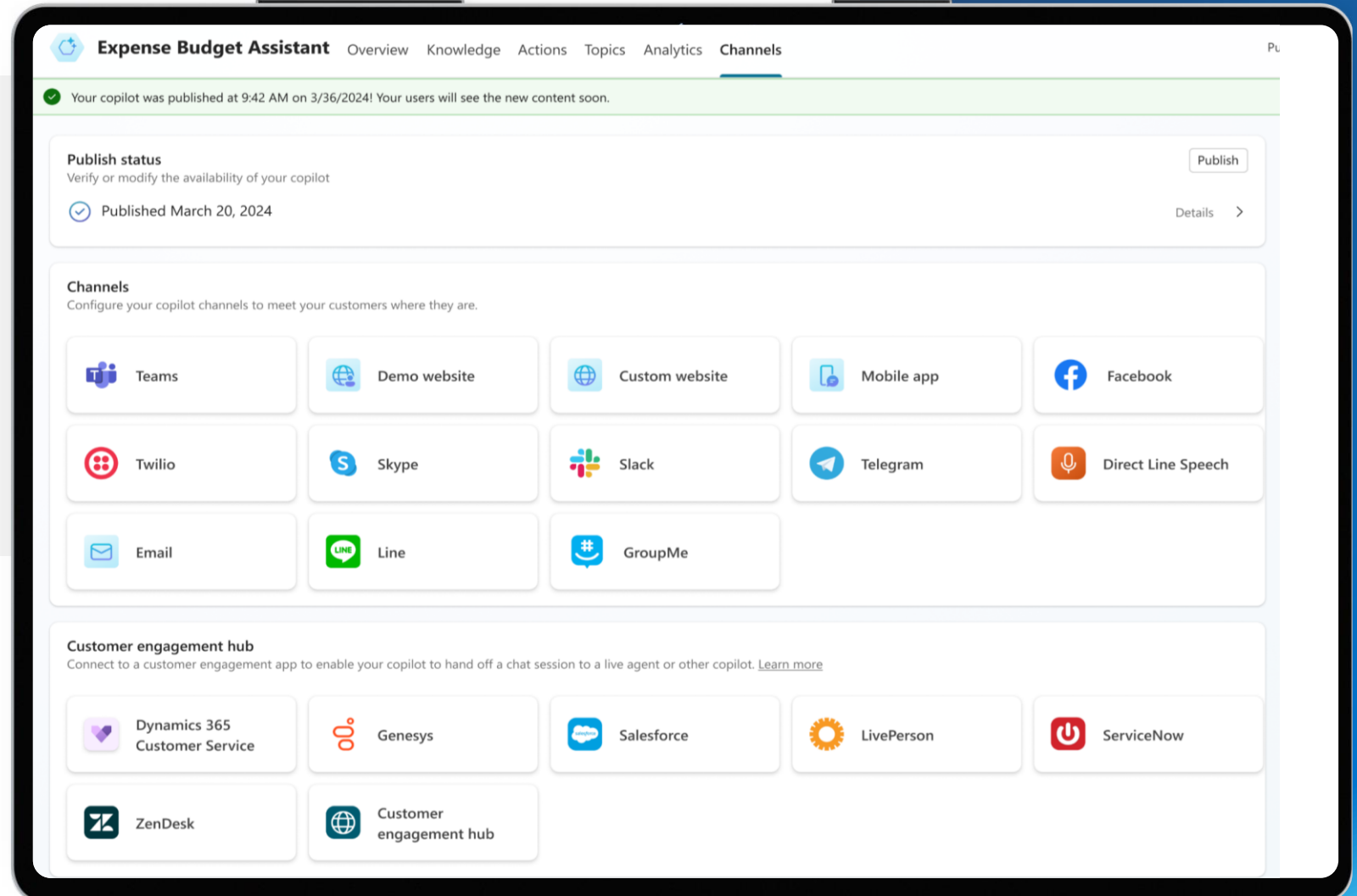
* Will only move to next stage(s) if necessary

Channels

Publish and deploy to your channels of choice with a single click.

Add your agent to a custom app built with Power Apps or a custom website built with Power Pages.

You can access even more channels through ISVs, including:



Autonomous agents

Handle variability and complexity at infinite scale

Independently begins work based on autonomous triggers

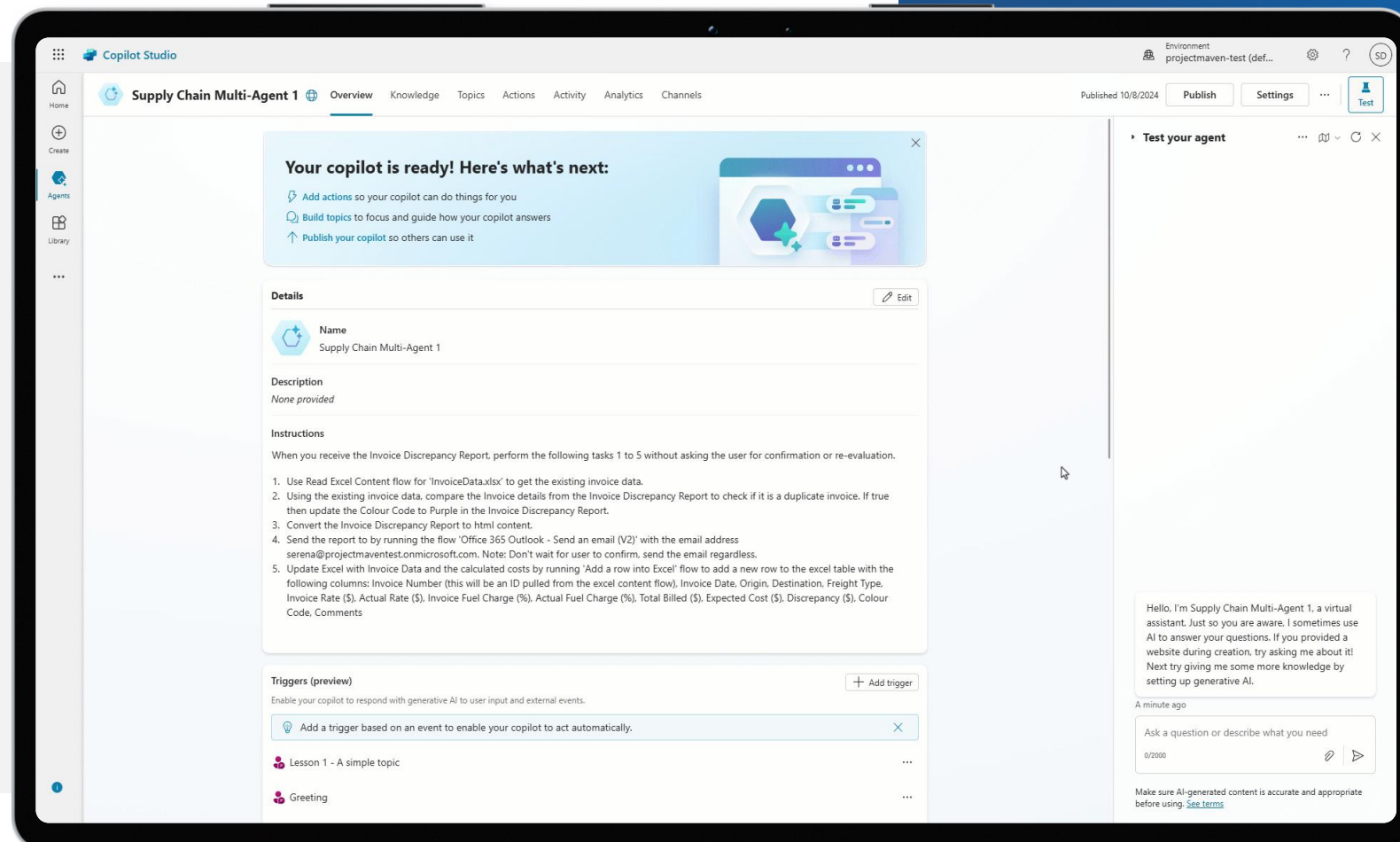
Automates long running processes

Dynamically **reasons** over its capabilities

Learns and improves

Follows **human guard rails** and asks for help

Orchestrate other agents



Use agents in Copilot Chat or Copilot Studio

Copilot Chat

Free and secure web grounded AI chat

IT controls

Agents (paid on consumptive basis)

Copilot Studio

Agents (paid on consumptive basis)

Secure and govern Copilot with Microsoft Security



Foundational

Microsoft 365 Copilot
+ Business Basic
+ Business Standard

Multi-factor Authentication
Audit logging
Search and export
Retention or deletion policies
Restricted SharePoint Search



Core

Microsoft 365 Copilot
+ Business Premium
+ Microsoft 365 E3
+ SharePoint Advanced Management

Conditional Access
Manual sensitivity labels
Data loss prevention policies
Advanced SharePoint sitewide access controls and reporting
Search, export, eDiscovery case management, and legal hold



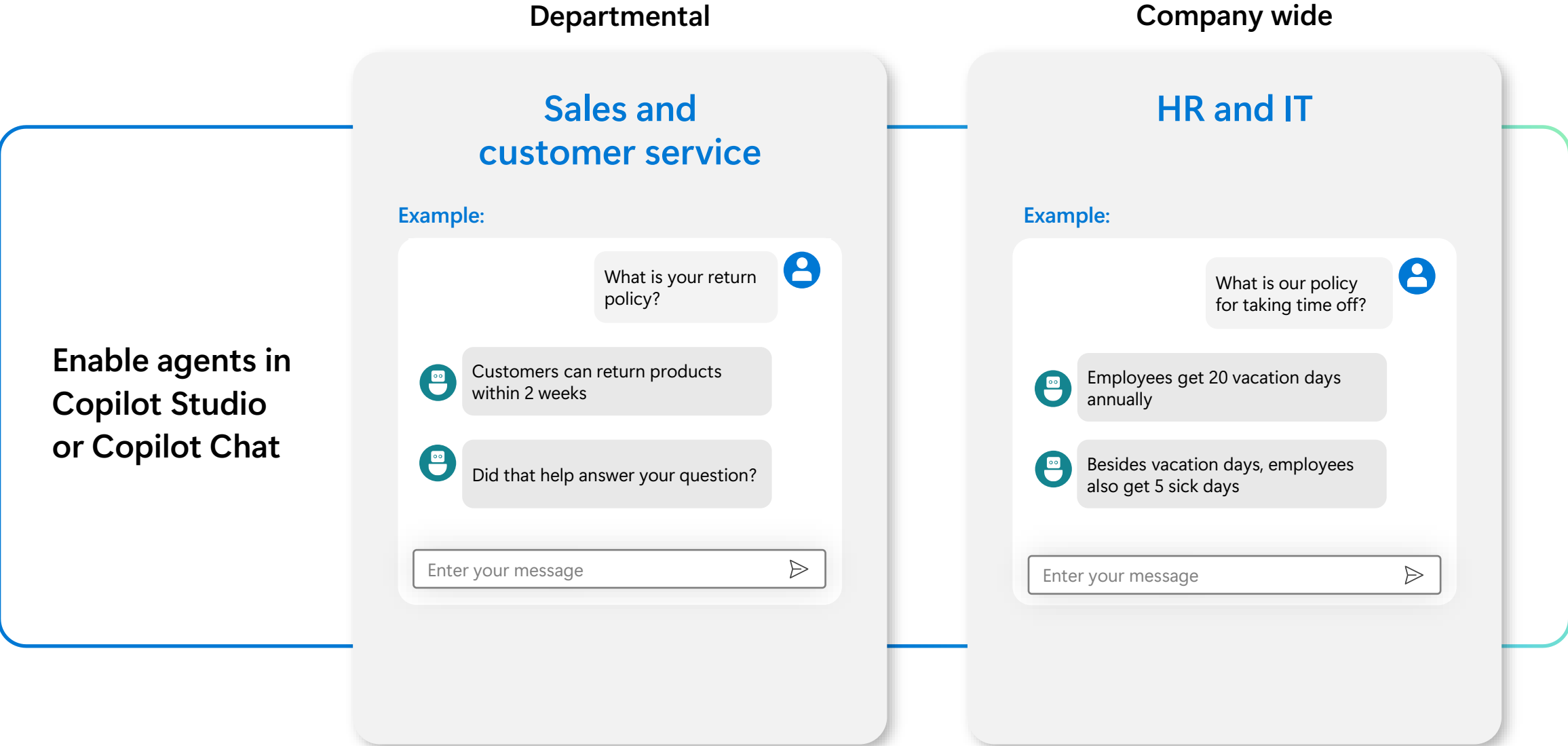
Best-in-class

Microsoft 365 Copilot
+ Microsoft 365 E5
+ SharePoint Advanced Management

Conditional Access based on identity risk
Automatically apply sensitivity labels
Automatically remove inactive content
Prevent data leak on endpoint devices
Detect non-compliant usage

Customer use cases

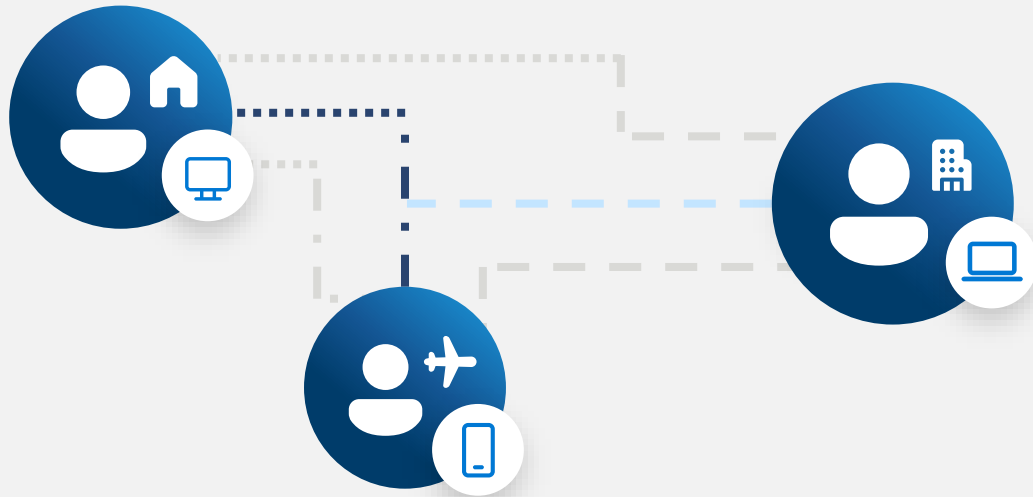
Key CSP agent use cases



Challenge

Customer service

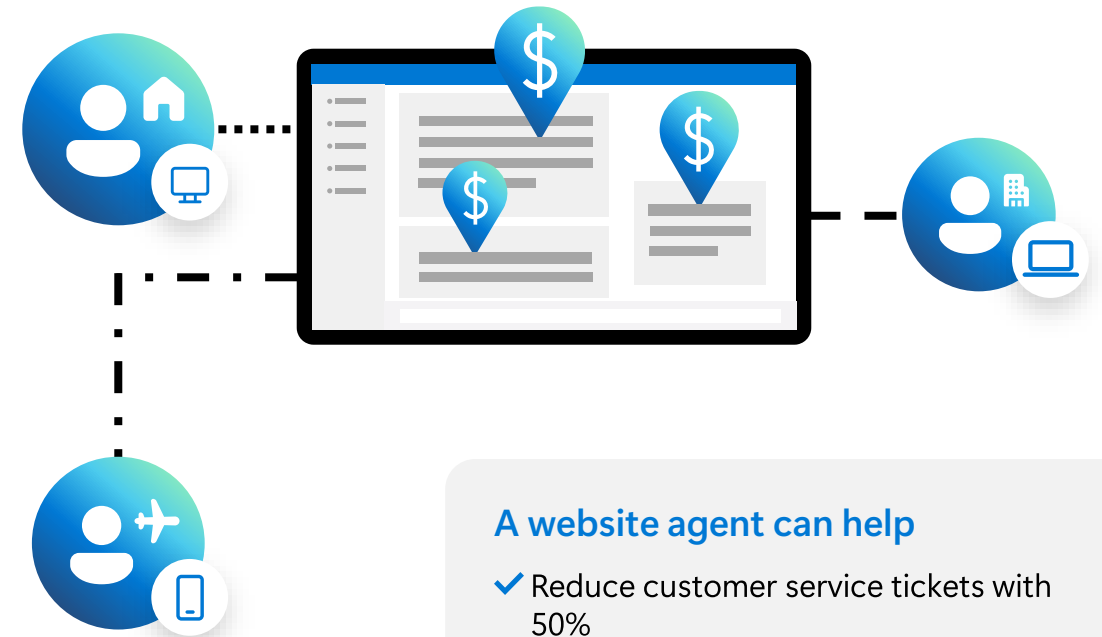
Northwind Traders struggled to manage the high volume of customer service cases with only two representatives. Many inquiries required searching for information or placing orders, which slowed down response times and reduced customer satisfaction.



Solution

Website customer service agent

By implementing a customer service agent using Copilot Studio on their website, they reduced their customer service cases by 50%. The agent handled routine inquiries, placed orders, returns and provided product information, allowing human agents to focus on complex issues. This improvement decreased response times and enhanced customer satisfaction.



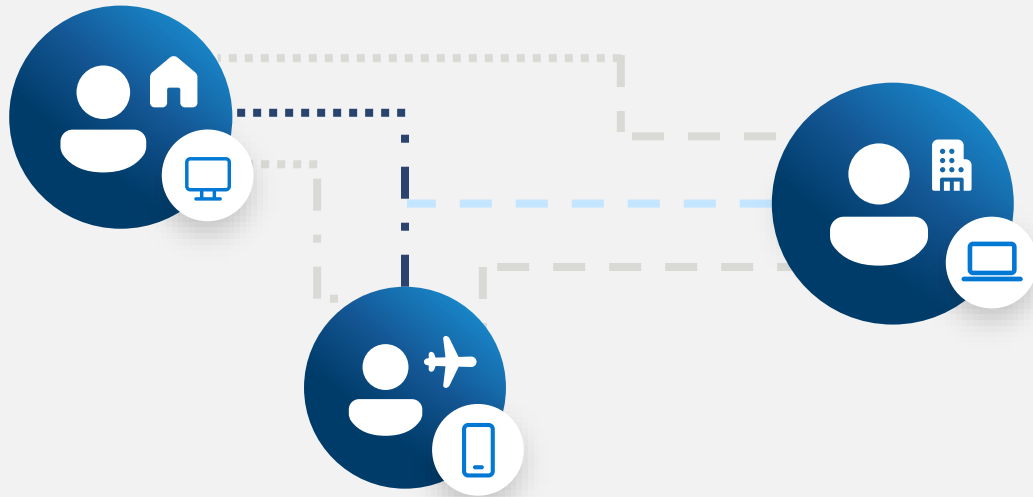
A website agent can help

- ✓ Reduce customer service tickets with 50%
- ✓ Help drive sales conversion and customer satisfaction

Challenge

Customer service

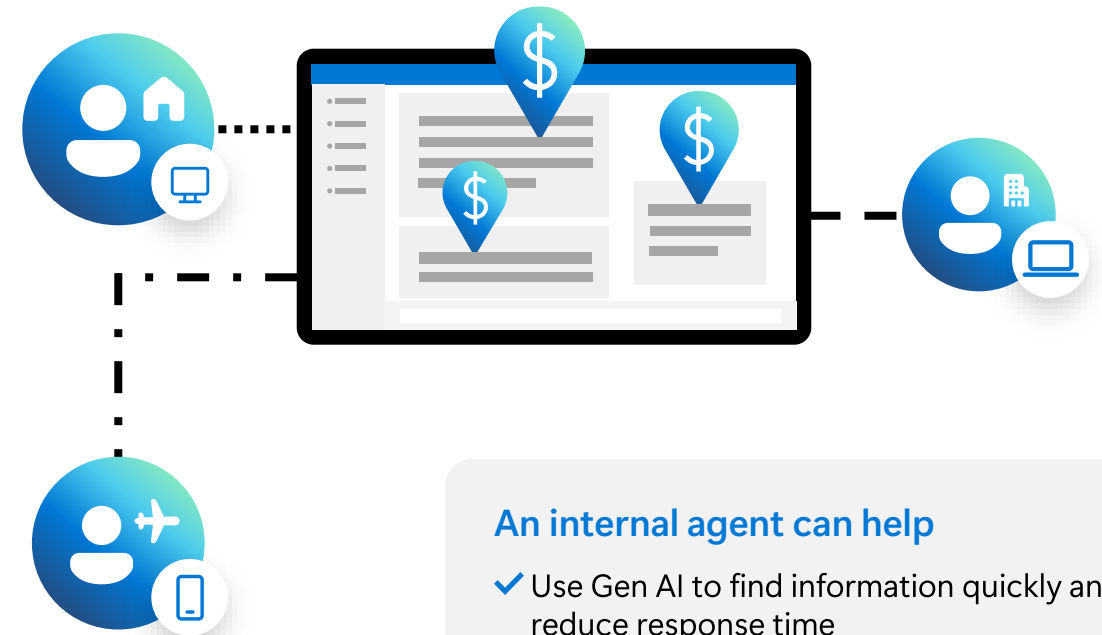
Northwind Traders struggled to manage the high volume of customer service cases with only two representatives. Majority of tickets required the reps to look up information about previous customer service history, products, services and processes. Finding this information consumed valuable time and slowed down response times. This led to longer wait times for customers and reduced overall customer satisfaction.



Solution

Internal customer service agent

Northwind Traders implemented an internal customer service agent using Copilot Studio. This agent, powered by Gen AI, acted as an assistant to help the customer service reps quickly find information and support in resolving complex cases, such as error codes or product faults they had never seen before. As a result, the average time spent per case was reduced by 40%, significantly enhancing customer satisfaction.

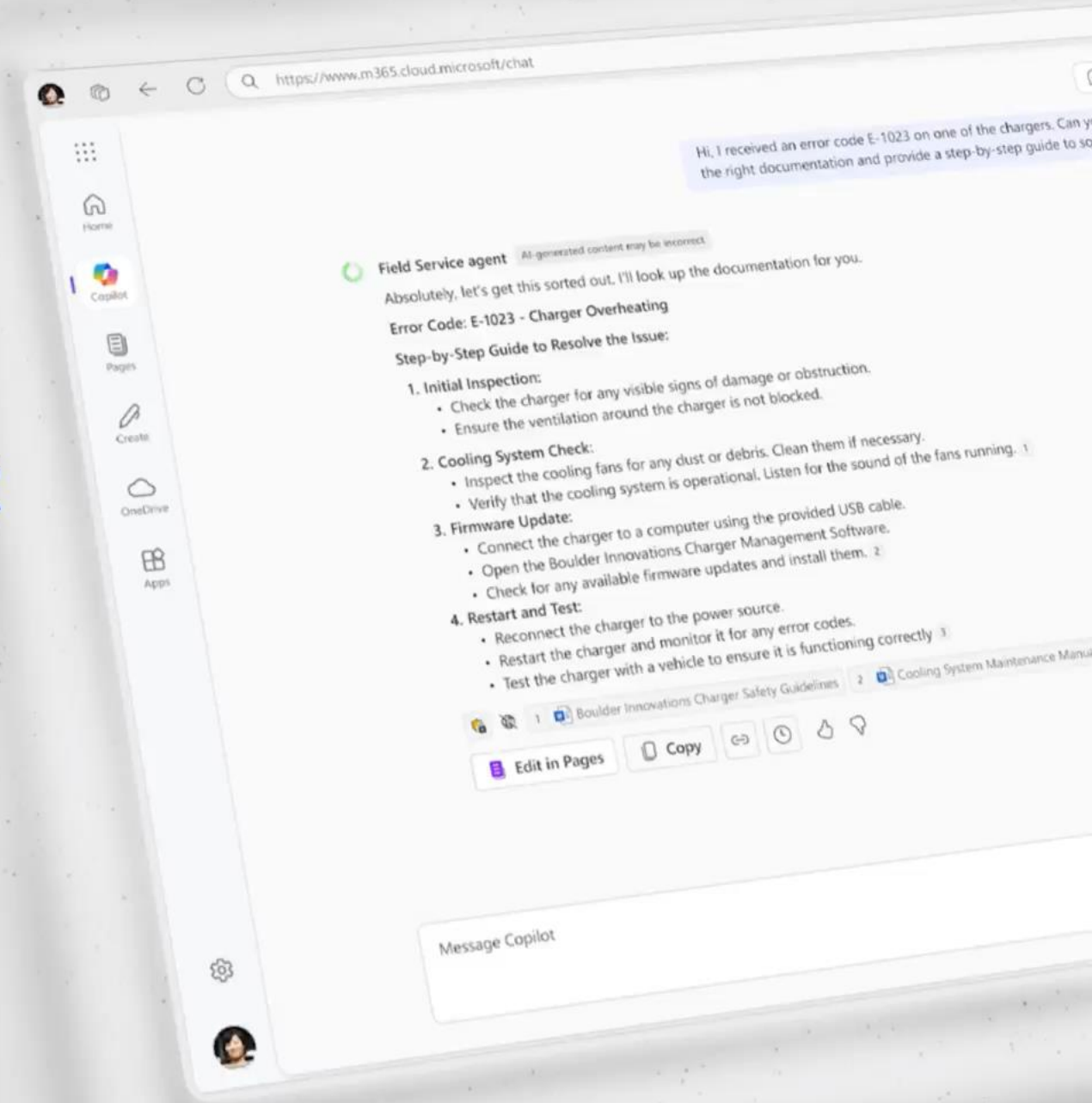


An internal agent can help

- ✓ Use Gen AI to find information quickly and reduce response time
- ✓ Improve customer satisfaction

Microsoft 365 Copilot Chat

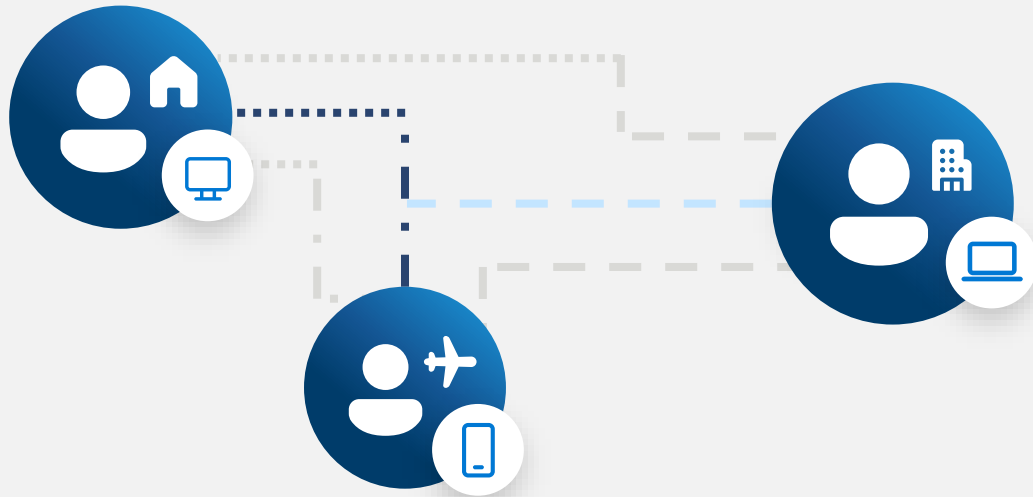
Customer service agent



Challenge

Seller productivity

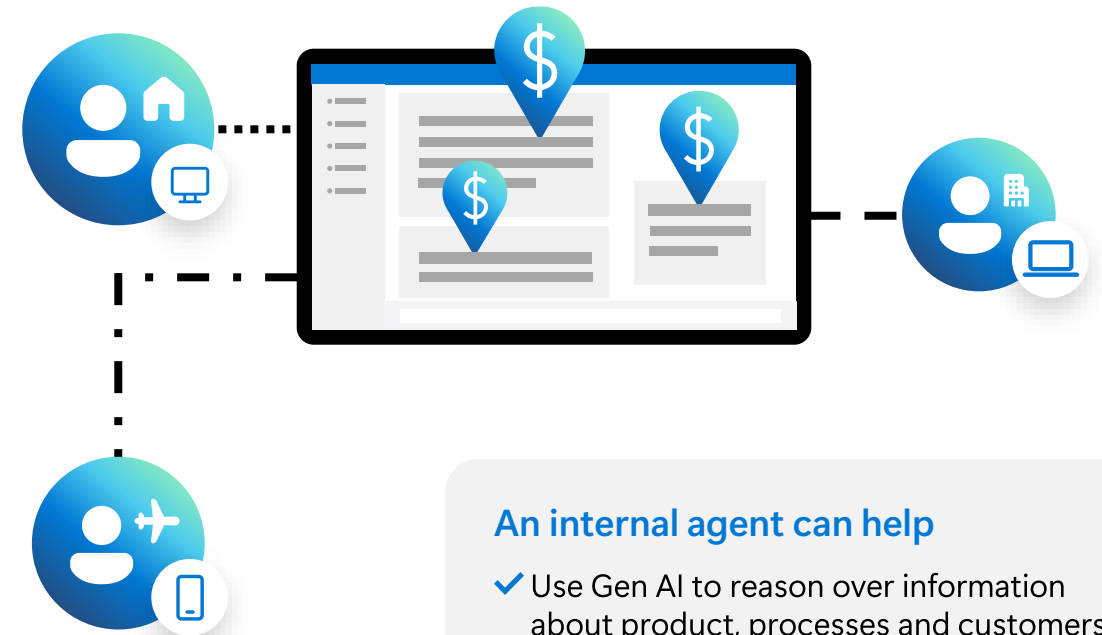
Northwind Traders' sales team faced the challenge of spending excessive time searching for information across various sources, including CRM and LinkedIn. This time-consuming process reduces their ability to build trust with customers and hampers productivity.



Solution

Internal sales agent

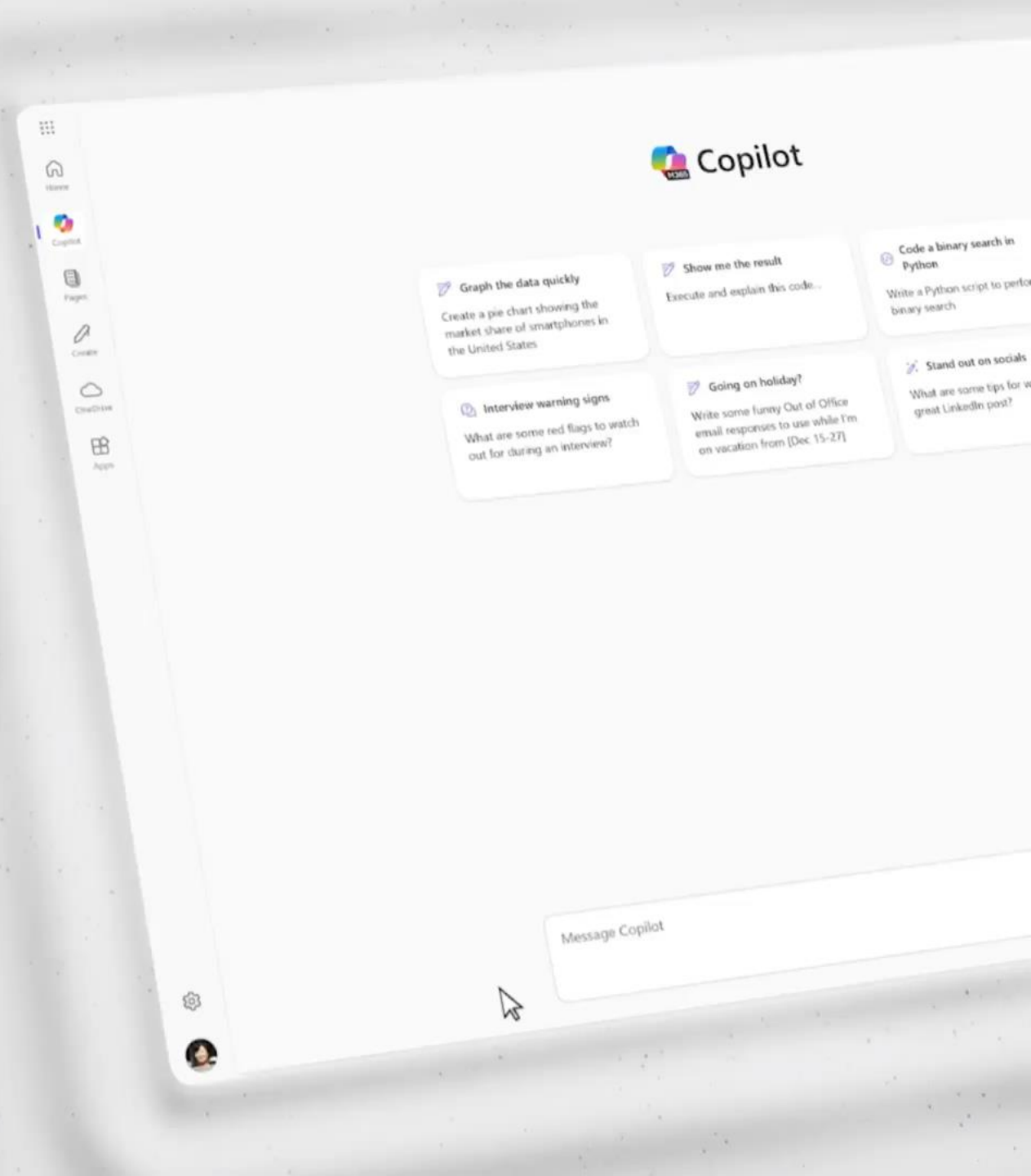
Northwind Traders implemented a Sales Agent that creates enriched customer profiles using CRM data to help sellers prepare for customer meetings, and access actionable insights quickly right in Copilot Chat. Additionally, it can find product information and help sellers answer questions during customer interactions, enhancing the overall customer experience and sales results.



An internal agent can help

- ✓ Use Gen AI to reason over information about product, processes and customers from CRM.
- ✓ Help increase seller productivity and support revenue growth.

Microsoft 365 Copilot Chat Sales agent

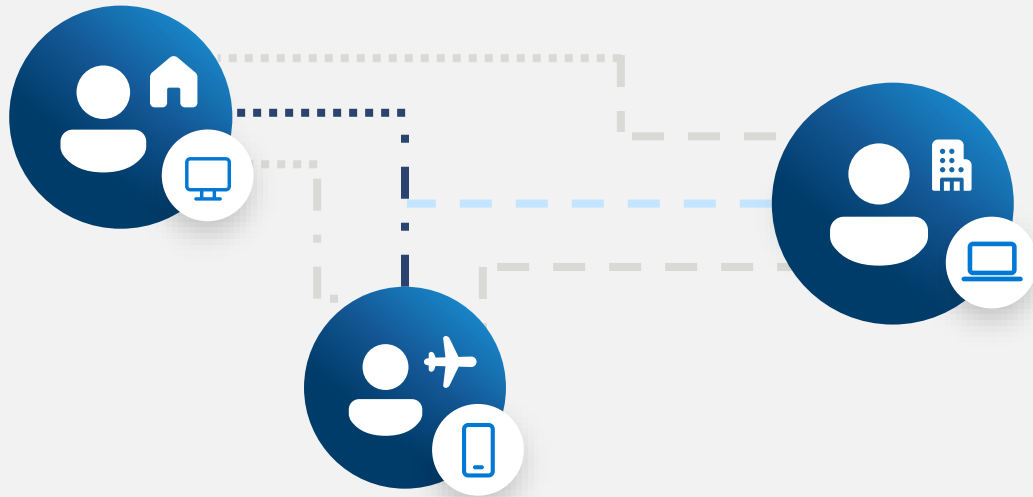


Challenge

HR requests

Northwind Traders has one HR representative that receives the same types of questions from various employees on a weekly basis, and the HR tasks that employees are looking to do are centered on a few key areas like registering time off or sick days.

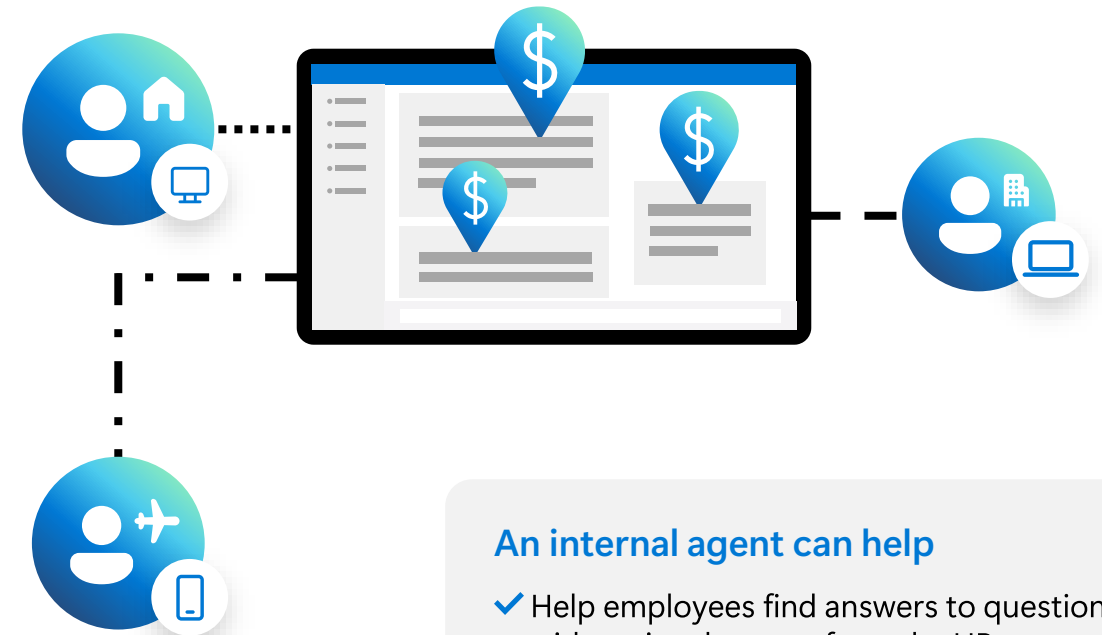
All the time spent registering, approving routine tasks and searching for information could be spent on more complex HR cases.



Solution

Internal HR agent

With agents in Copilot Studio, Northwind Traders implemented a HR agent. Now, employees can easily ask the agent to help register vacation or sick days, that automatically routes to a manager for approval, without any need for HR to register the request manually. The agent can also reason over the company's HR information to help answer routine questions.



An internal agent can help

- ✓ Help employees find answers to questions without involvement from the HR rep
- ✓ Help enable employee self serve