



Boost Sales Effectiveness with Microsoft Copilot Studio

True.org Cloud



But organizations may encounter challenges when building agents at scale



Budget and time constraints



Infrastructure and resource hosting



Integration with business systems



Technical expertise



Security and compliance risks



Maintaining content

What is an agent?

Agents use AI to **automate and execute business processes**, working alongside or on behalf of a person, team, or organization.

Deploy to...



Microsoft Copilot

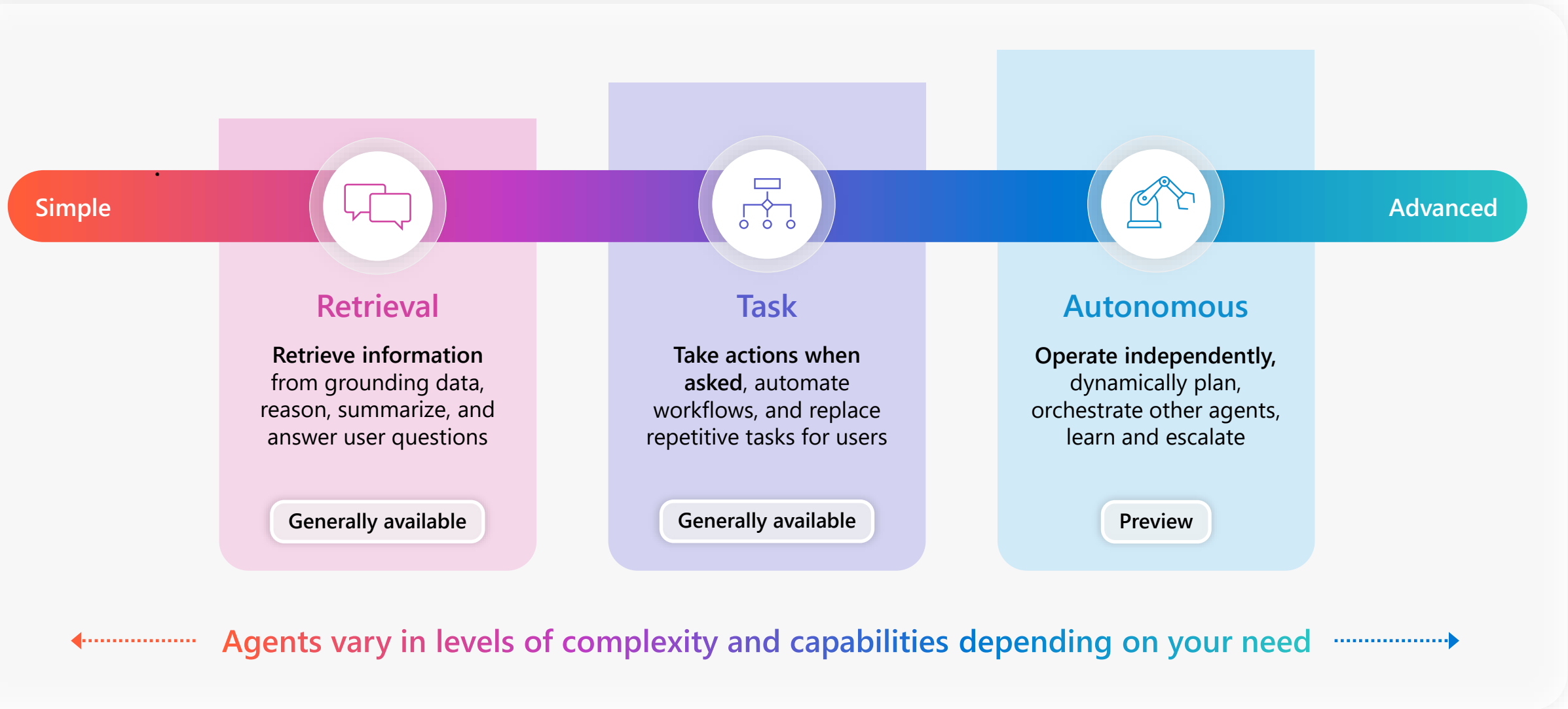


Your applications



Your websites

Spectrum of agents



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

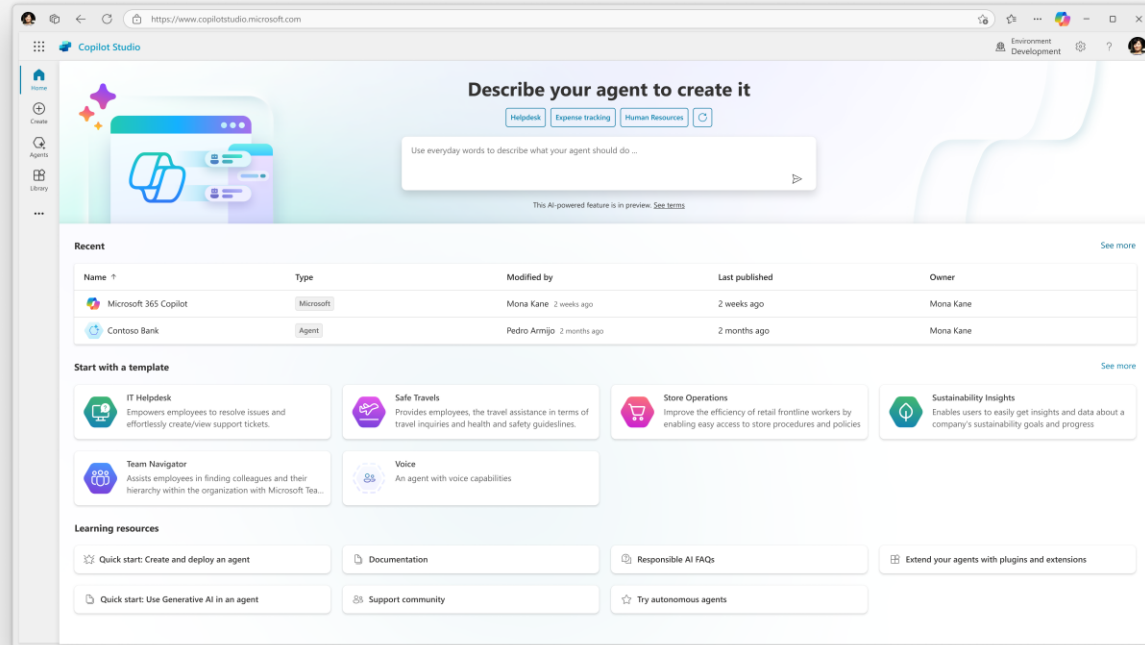
The agent has identified new support issues and triaged to other agents.





Copilot Studio

Copilot Studio is a low code tool for **building agents** and **extending Microsoft 365 Copilot**.



✔ Meet your users where they already are

✔ Access everything in one place

✔ Automate your workflows

✔ Integrate with your external apps

✔ Connect to your data in Microsoft 365

Create chat experiences that are...



Intelligent

Remember and understand user context and intent



Secure

Maintain industry standards for governance, security and lifecycle management



Automated

Dynamically complete tasks and automate workflows



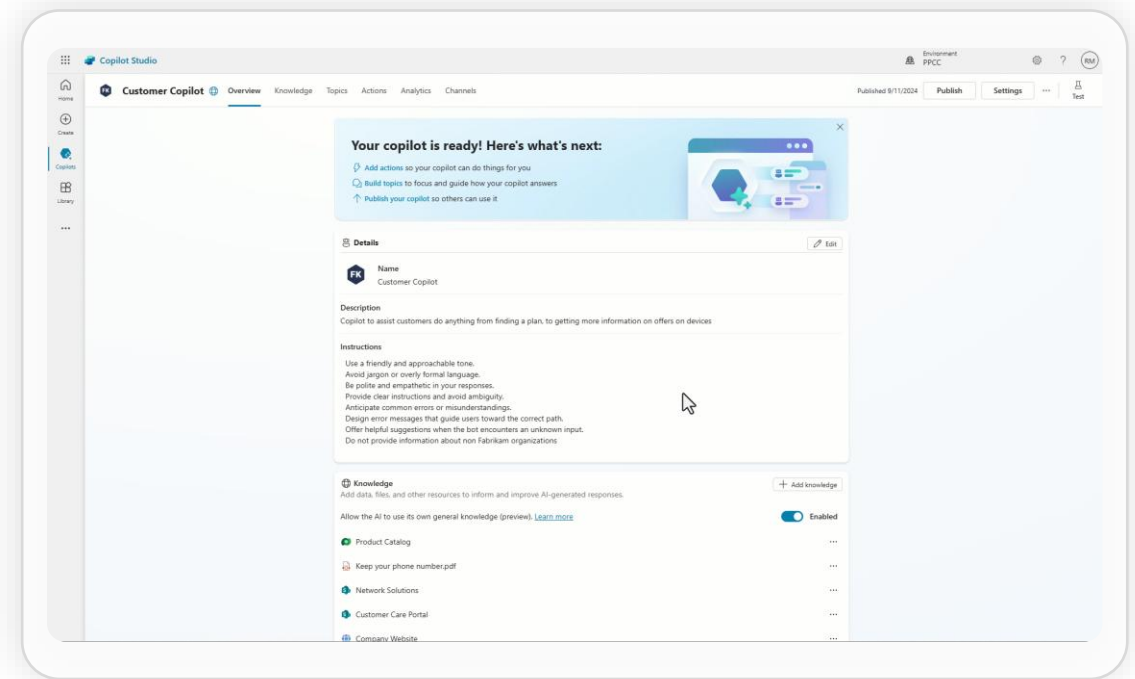
Customizable

Connect to your data and legacy systems, extend across Microsoft's ecosystem and more



Collaborative

Interact with agents as if they were another member of the team



Evolution

2023

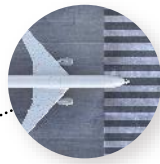
Search • Summarization • Generation

2024+

Customization • Collaboration • Automation



Travel and Transportation



Professional Services



Customer Service



Government



Finance



Retail



HR



Healthcare



IT



Financial Services



Legal



Education



Sales & Marketing



Manufacturing



Design powerful, connected agents

Handle complex queries with ease

Design intelligent conversations with greater control over the LLM such as robust conversational orchestration, logic, and responses.

Design personalized, responsive interactions

Engage employees or customers with rich, dynamic interactions that remember user content and context.

Customize your agent how you want

Build custom actions and surface your business data where you need it.

Connect to your organization's knowledge bases

Use generative AI to dynamically respond using your organization's real-time content.

Create automated workflows

Use Power Automate to trigger automation across your business with UI, API, DPA, and RPA automation capabilities.

Escalate to human agents when needed

Continue the conversation with full context with an end-to-end customer engagement platform.

Build the way you want

Users of all skill levels can create and test together

Preview

Out-of-box agents

Start with a template

- IT Helpdesk**
Empowers employees to resolve issues and effortlessly create/view support tickets.
- Safe Travels**
Provides employees, the travel assistance in terms of travel inquiries and health and safety guidelines.
- Team Navigator**
Assists employees in finding colleagues and their hierarchy within the organization with Microsoft Tea...
- Voice**
An agent with voice capabilities

Learning resources

- Quick start: Create and deploy an agent
- Documentation
- Quick start: Use Generative AI in an agent
- Support community

Get started quickly

Choose from a diverse set of pre-built agents for popular scenarios across industries and functions.

Preview

Natural language

Describe your agent to create it

Helpdesk Expense tracking Human Resources

Use everyday words to describe what your agent should do...

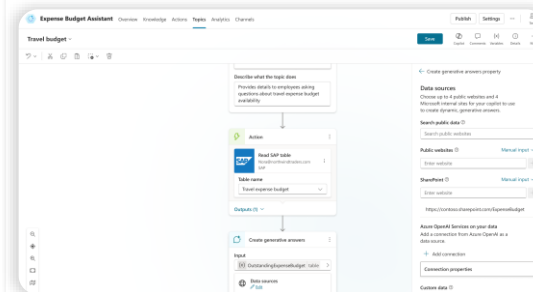
This AI-powered feature is in preview. [See terms](#)

Modified by	Last published
Mona Kane 2 weeks ago	2 weeks ago

Build conversationally

Build agents by engaging in a conversational, natural, human-like experience.

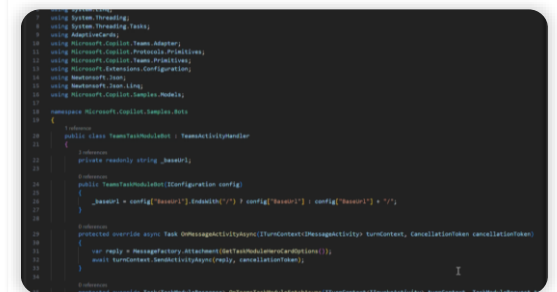
Visual canvas



Navigate a modern UX

Design your conversation by following the low code graphical interface.

Code

















Agent SDK

Develop agents using advanced, flexible tools by leveraging the Microsoft Agent Framework.






Explore agents prebuilt for you

Choose from a variety of agents that are ready to deploy or customize further to fit your business needs

Copilot Studio

 Safe travels	 Team navigator	 Self-help	 IT helpdesk	 Case management
 Leave management	 Awards & recognition	 Weather	 Wellness check	 Benefits
 Inclusivity	 Financial insights	 Citizen services	 Sustainability insights	+ more coming soon

Copilot Chat

 Idea Coach	 Prompt Coach
 Career Coach	 Learning Coach
 Writing Coach	+ more coming soon

* Some listed options may only be available in preview



Employee Self-Service Agent

In Microsoft 365 Copilot

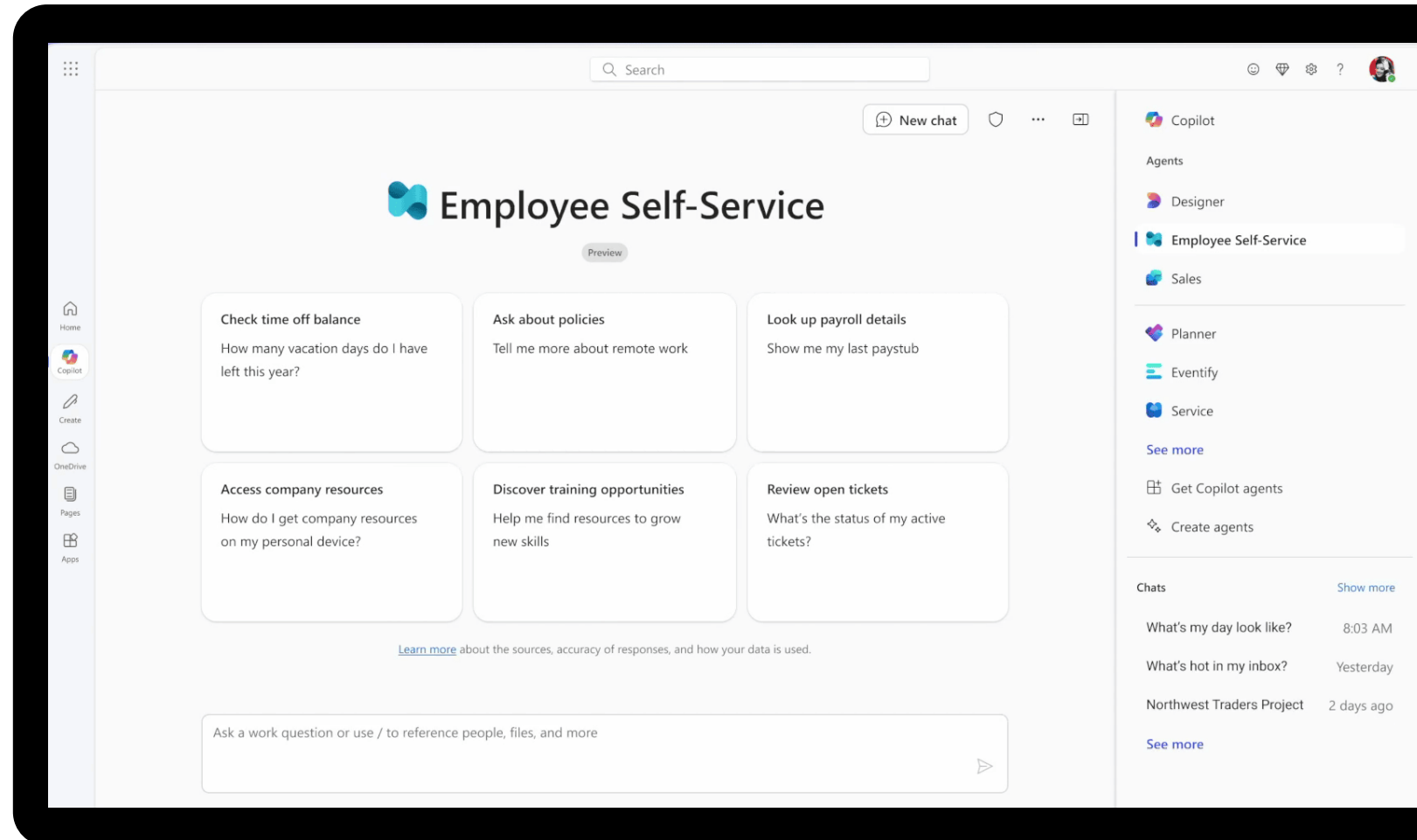
Preview

Answer common workplace policy-related questions and support employees with key HR and IT tasks to improve resolution times

Connect employees to official answers from internal knowledge bases like SharePoint sites

Empower answers and action on HR/IT data from Microsoft-built connectors from Workday, SAP, and ServiceNow

Customize pre-built workflows around common topics like benefits and IT Helpdesk in Copilot Studio



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

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

SharePoint / OneDrive

Dataverse

Microsoft Fabric *(coming soon)*

File uploads

Microsoft Graph connectors

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 1500+ 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

Dataverse



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



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 human agent.

The screenshot displays the 'Expense Budget Assistant' interface, specifically the 'Topics' tab. The main workspace shows a logic flow diagram for a topic named 'Travel budget'. The flow starts with a description box: 'Describe what the topic does' with the text 'Provides details to employees asking questions about travel expense budget availability'. This leads to an 'Action' block titled 'Read SAP table' by user 'Nora@northwindtraders.com'. The 'Table name' is set to 'Travel expense budget'. Below this is an 'Outputs (1)' section. The flow then leads to a 'Create generative answers' block. Its 'Input' is 'OutstandingExpenseBudget table' and it is linked to 'Data sources'. To the right, a configuration panel titled 'Create generative answers property' is visible. It includes sections for 'Data sources' (with search and manual input options for public websites and SharePoint), 'Azure OpenAI Services on your data' (with an 'Add connection' button), and 'Custom data' (with an 'Enter or select a value' field).

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

Orchestrates other agents

The screenshot displays the Copilot Studio interface for a project named "Supply Chain Multi-Agent 1". The interface includes a navigation sidebar on the left with options for Home, Create, Agents, Library, and a menu icon. The main content area features a "Your copilot is ready! Here's what's next:" section with three actionable items: "Add actions", "Build topics", and "Publish your copilot". Below this is a "Details" section for the agent, showing its name "Supply Chain Multi-Agent 1" and a description "None provided". The "Instructions" section contains a list of five tasks related to processing an Invoice Discrepancy Report. At the bottom, there is a "Triggers (preview)" section with an "Add trigger" button and a list of existing triggers like "Lesson 1 - A simple topic" and "Greeting". On the right side, there is a "Test your agent" panel with a chat interface showing a greeting from the agent and a user's prompt: "Ask a question or describe what you need". The top right corner shows the environment name "projectmaven-test (def...)", a "Published 10/8/2024" status, and buttons for "Publish", "Settings", and "Test".

Extend Microsoft 365 Copilot

Copilot Studio agent builder allows you to build an agent directly in Copilot Chat and SharePoint

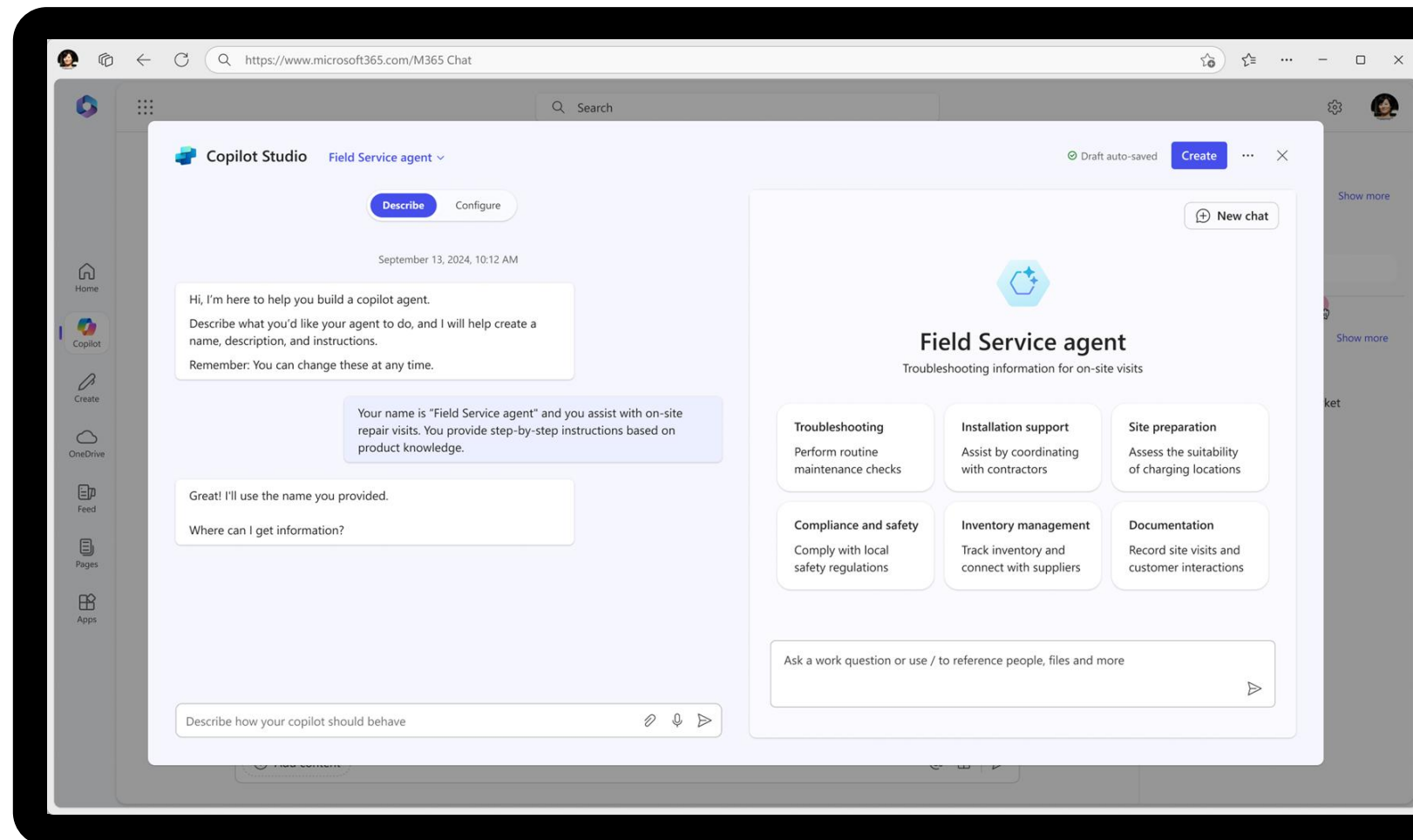
Empower end users to **build knowledge-only agents** using natural language

Get started quickly with **agents pre-built for you** in Copilot Chat

Take your agent a step further by **adding actions** in the full Copilot Studio experience

Seamlessly **share your agent** across your organization with shareable links

Ensure compliance with **centralized management** tools



Enhance with advanced capabilities

Customize your agent with pro developer tools

Integrate with Azure AI Foundry tools, like Azure AI Search and Model Catalog, for greater control and customization as you scale.

Analyze your agent's performance

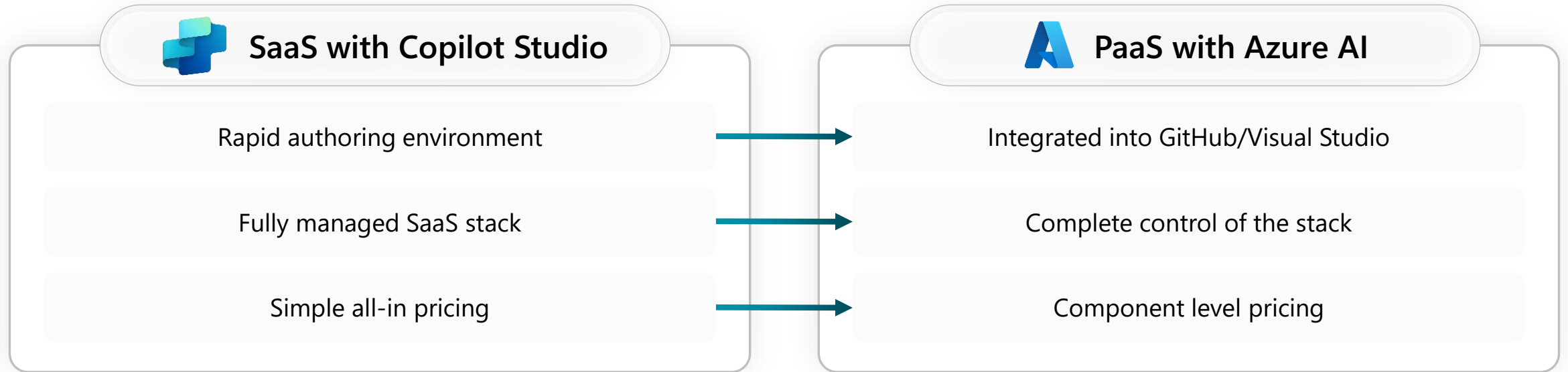
Access built-in conversational analytics that automatically track critical KPIs.

Continuously improve the conversation

AI-driven features will help you to fine-tune your agent over time by providing suggestions on how to optimize your conversations.

One conversational AI ecosystem

Access more advanced customization tools by building across Microsoft Copilot stack



Start with Copilot Studio and seamlessly integrate with Azure AI



Easily optimize with data-driven insights

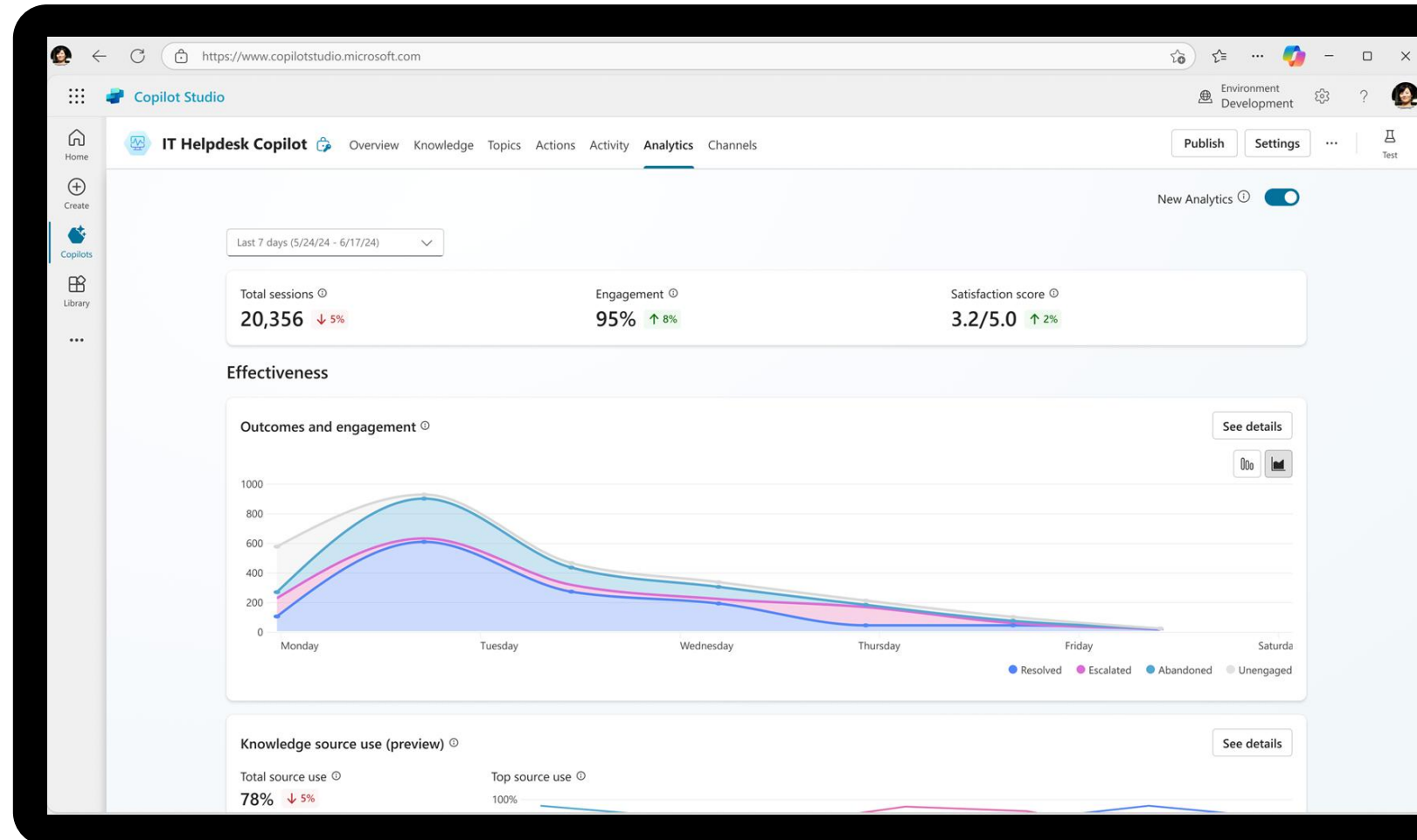
Preview

See which topics are having the greatest impact on **escalation, abandon** and **resolution rates**.

Quickly gain a sense of the **most common questions** your users are asking your agent.

Get access to detailed **CSAT data, user feedback, knowledge sources used** and more.

Identify where your agent **didn't successfully return an answer** so you can fill in the gaps.



Manage securely across channels

Get the benefits of a global SaaS platform

Eliminate infrastructure concerns, scale securely, and simplify management and governance with unified controls.

Ensure your agent is compliant

Meet the necessary regulatory standards for your area or industry like GDPR, HIPAA, HITRUST, FedRAMP, PCI, SOC, ISO and more.

Safeguard your data

Deploy with confidence with automatic enterprise-grade data encryption, data loss prevention policies, and privacy standards.

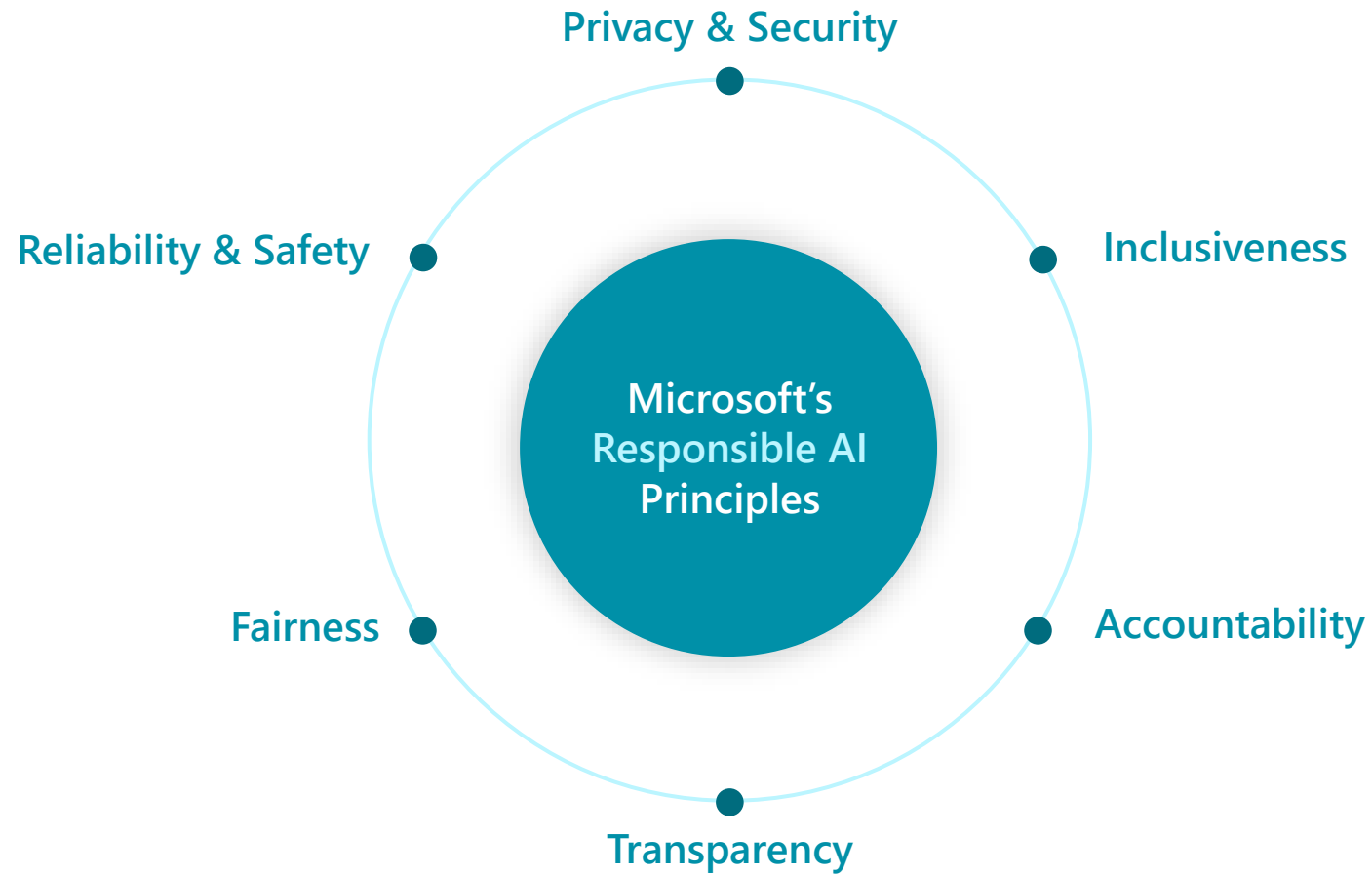
Govern at scale

Track and manage agents and users across the full lifecycle, control access, monitor usage, and set policies to protect sensitive data.

Use AI responsibly

All generative AI features are aligned to Microsoft's responsible AI principles and protects against AI risks like prompt injection.

Responsible AI

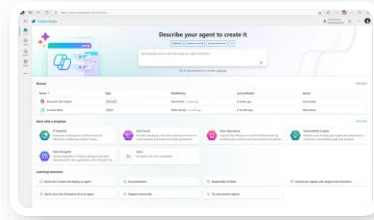
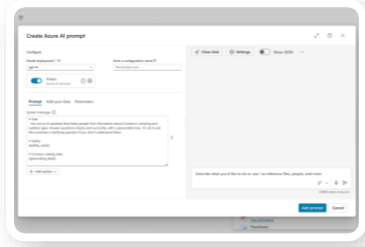


Building blocks to enact principles

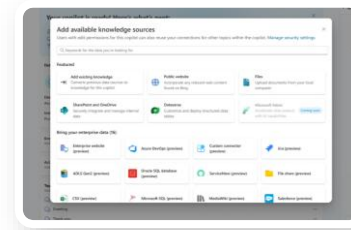


Design, enhance, and manage agents
Build an agent and go live quickly, all from one easy-to-use, E2E SaaS product

Integrate with AI services
Integrate with **Azure AI Studio**, **Azure Cog Services**, **Bot Framework** and other Microsoft conversational services

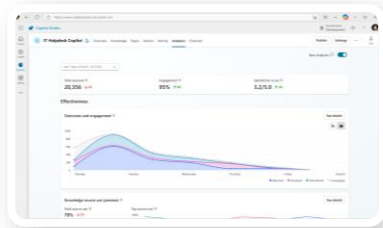


Build & Publish



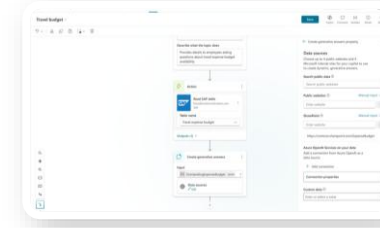
Chat over knowledge with gen AI
Get enterprise-specific answers using your files, websites, **Dataverse**, **third-party apps** and more

Monitor and improve
Access rich out-of-the-box insights and analytics

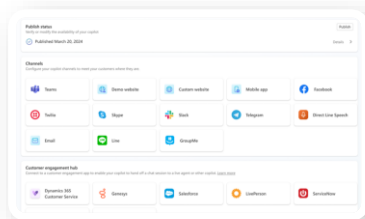


Copilot Studio

Create specific topics
Supplement gen AI responses with **specific, curated topics** for when you want more control

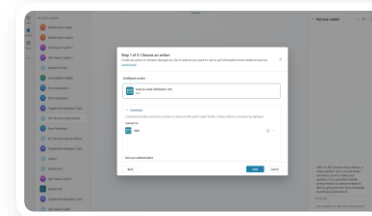


Publish to multiple channels
Publish in **20+ languages** and deploy to your channel of choice with a single click, including **Microsoft 365 Copilot**



Analyze & Improve

Build actions
Create actions and use **pre-built connectors** or **Power Automate** to call your backends and APIs or complete long-running tasks



Thank you.