Microsoft Power Platform

Boost Sales Effectiveness with Microsoft Copilot Studio

True.org Cloud

TRUE.ORG

But organizations may encounter challenges when building agents at scale

Budget and time constraints

Infrastructure and resource hosting

Integration with business systems

Technical expertise

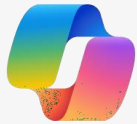**Security and compliance risks**

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.
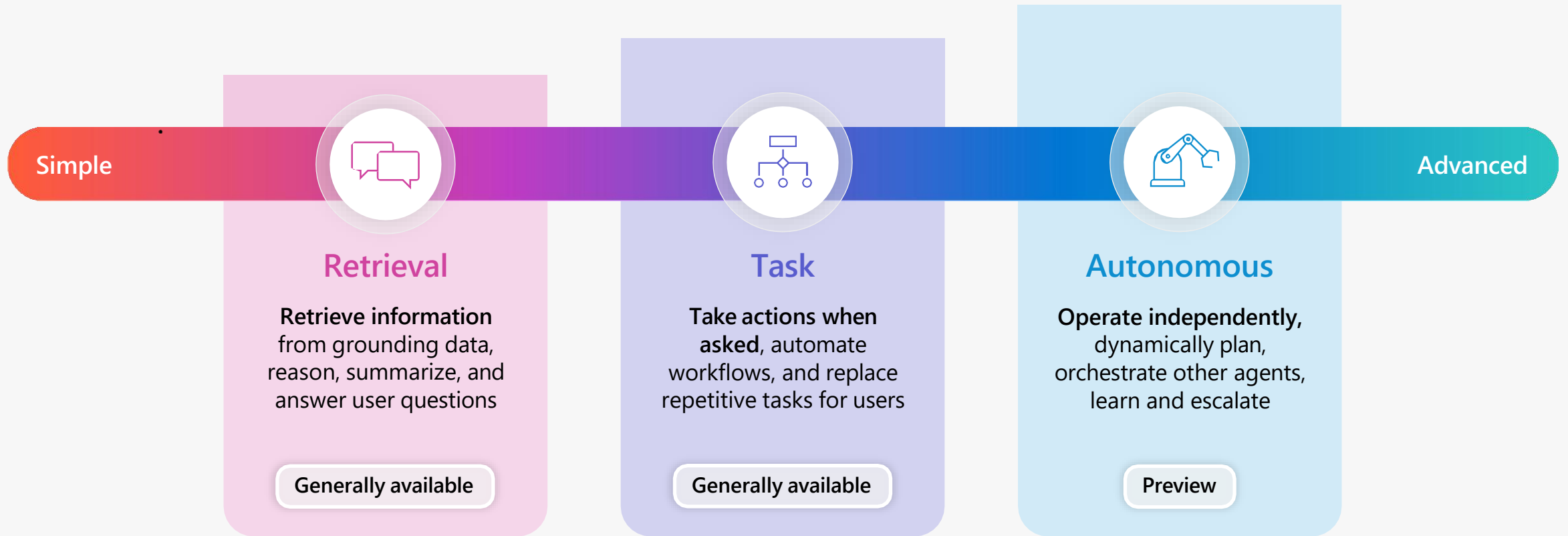
Deploy to...

Microsoft Copilot

Your applications

Your websites

Spectrum of agents

Simple		Advanced

Retrieval

Retrieve information from grounding data, reason, summarize, and answer user questions

Generally available

Task

Take actions when asked, automate workflows, and replace repetitive tasks for users

Generally available

Autonomous

Operate independently, dynamically plan, orchestrate other agents, learn and escalate

Preview

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 a low code tool for **building agents** and **extending Microsoft 365 Copilot.**
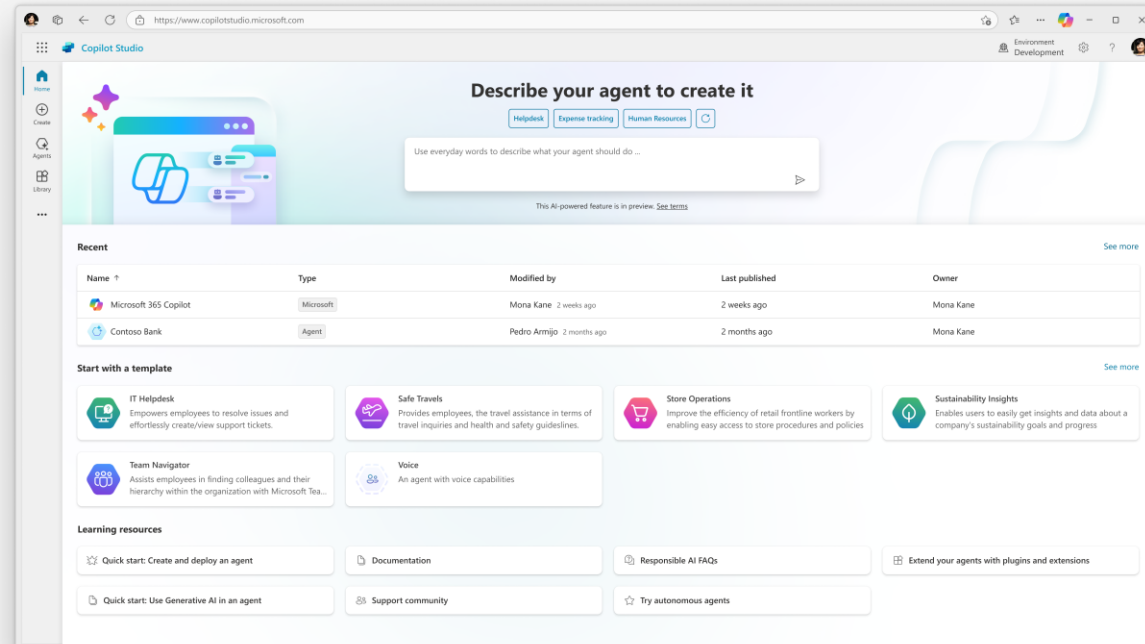
✓ Meet your users where they already are

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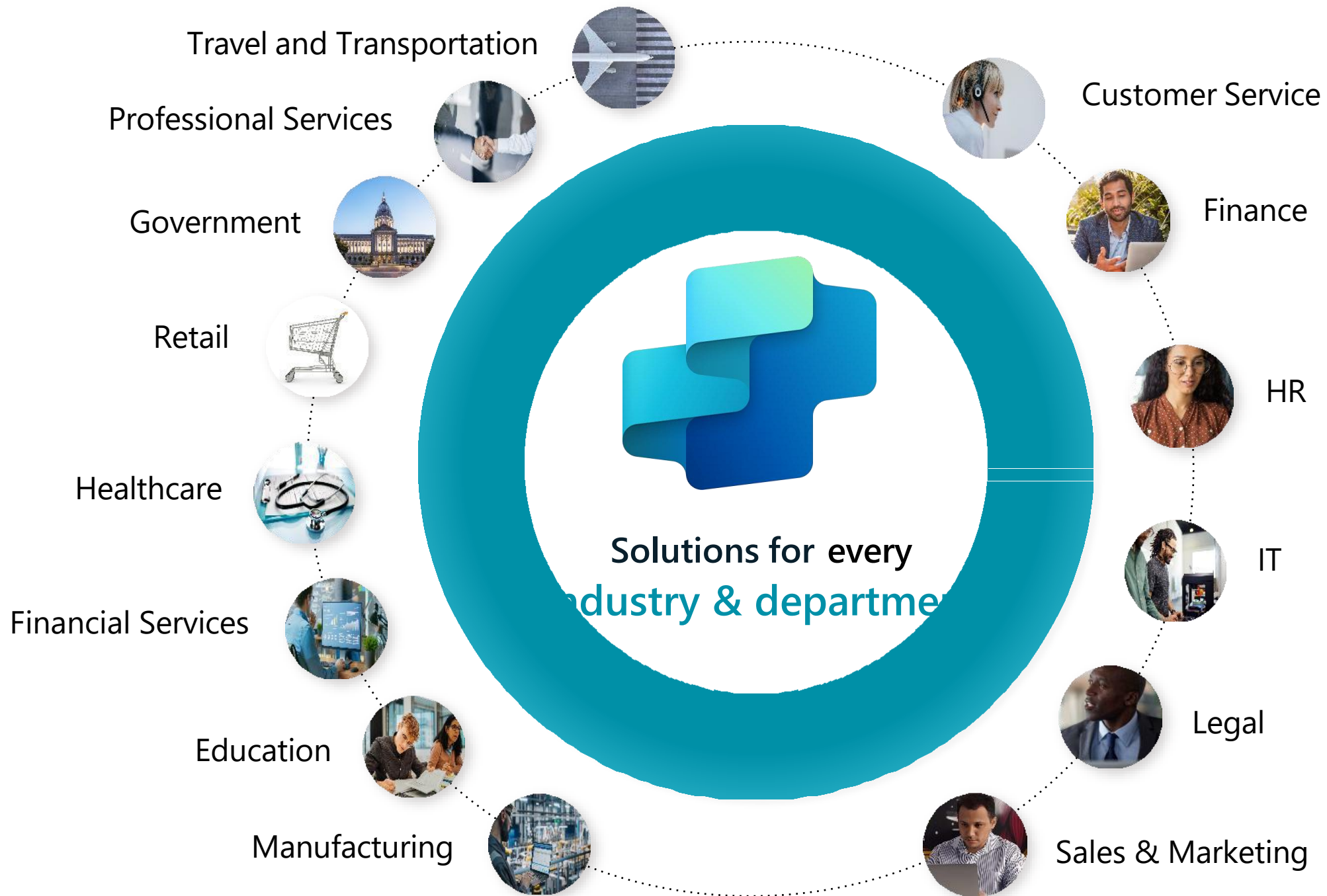Interact with agents as if they were another member of the team
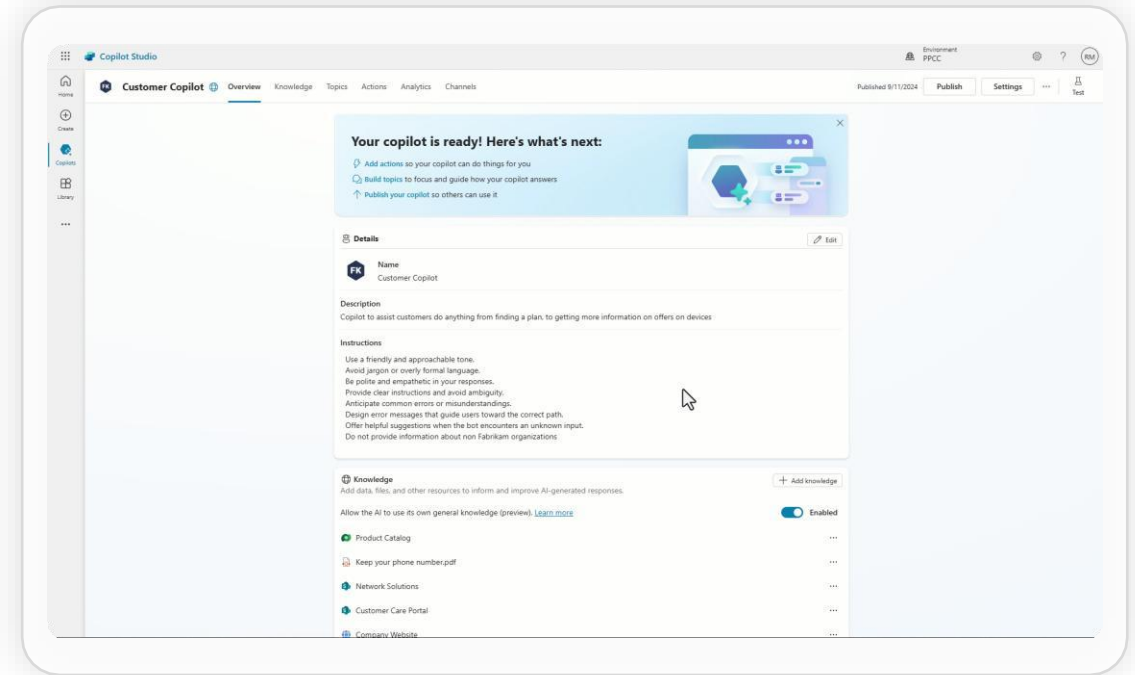
Evolution

2023 — Search • Summarization • Generation

2024+ — Customization • Collaboration • Automation

Travel and Transportation

Professional Services

Government

Retail

Healthcare

Financial Services

Education

Manufacturing

Customer Service

Finance

HR

IT

Legal

Sales & Marketing

Solutions for every industry & department

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
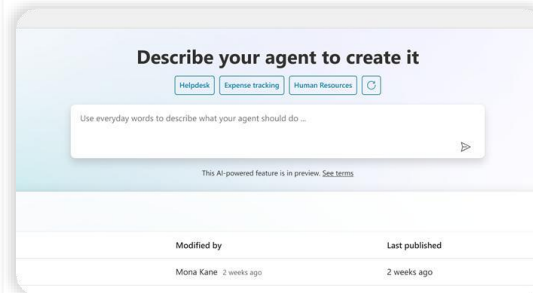

Preview

Out-of-box agents
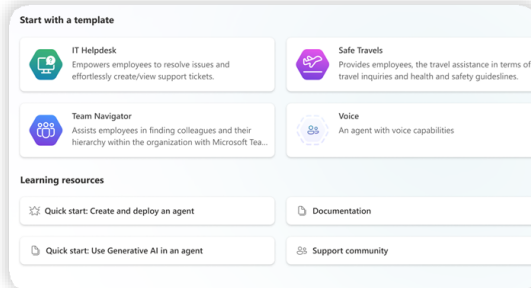
Get started quickly

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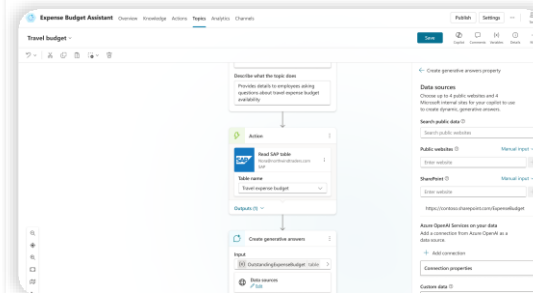
Preview

Natural language

Build conversationally

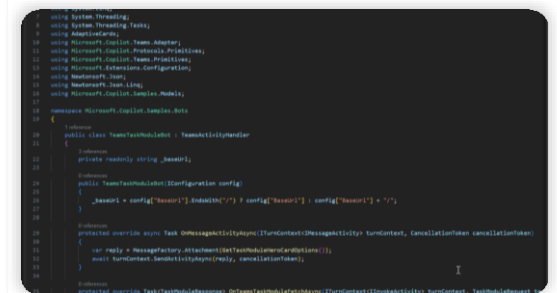Build agents by engaging in a conversational, natural, human-like experience.

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

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
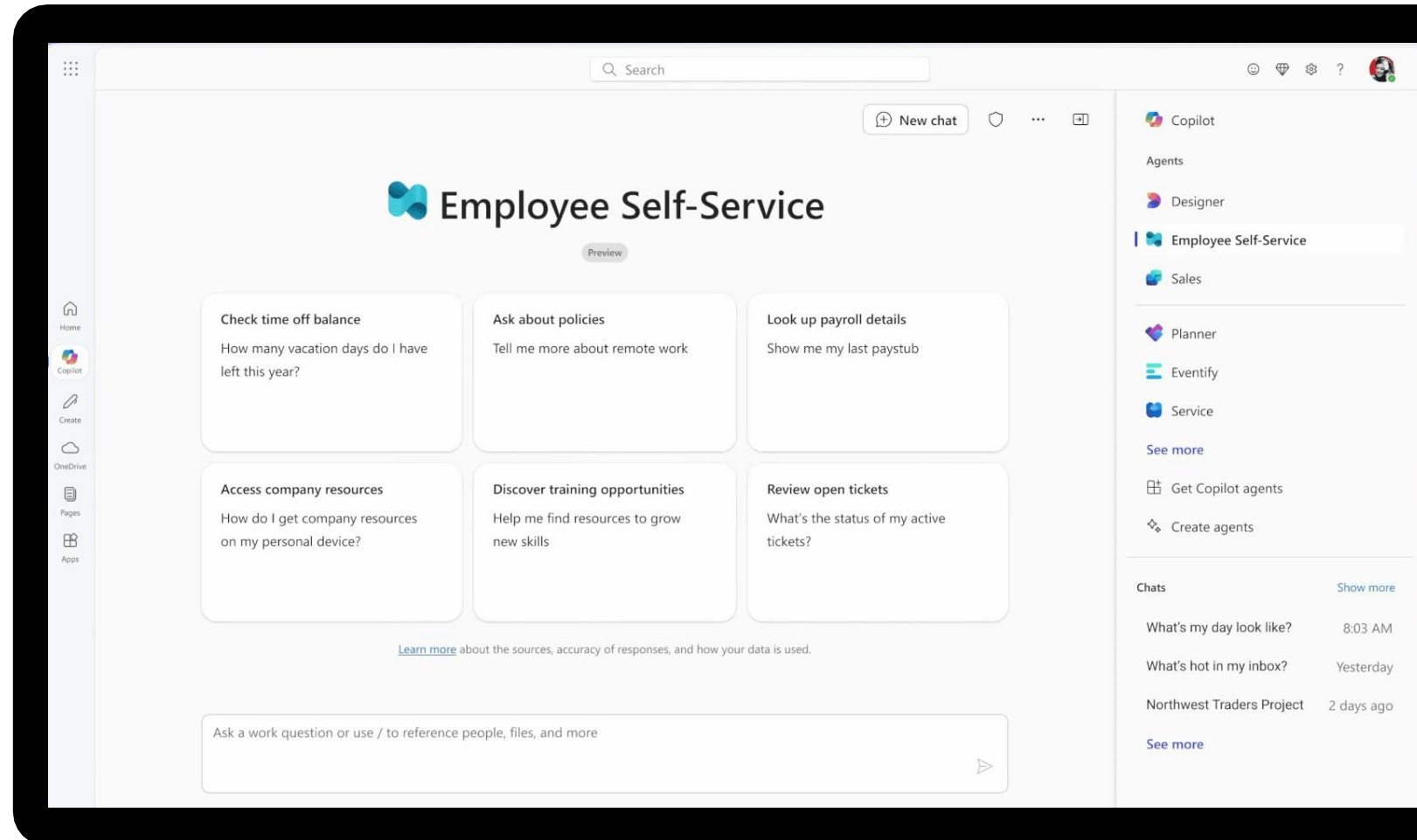
Customize your agent

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 you 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.
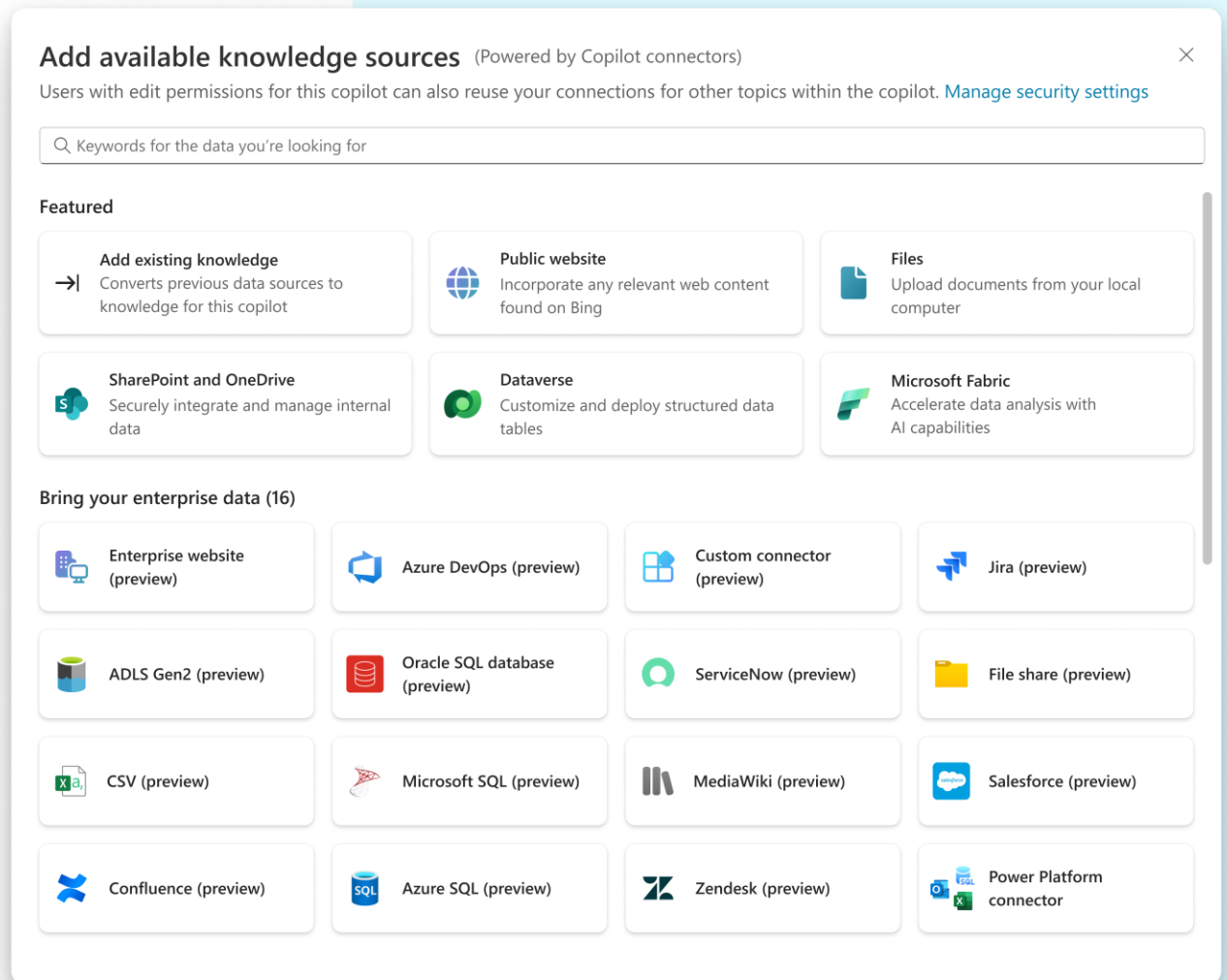
Supported data sources include:

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

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

1500+

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.
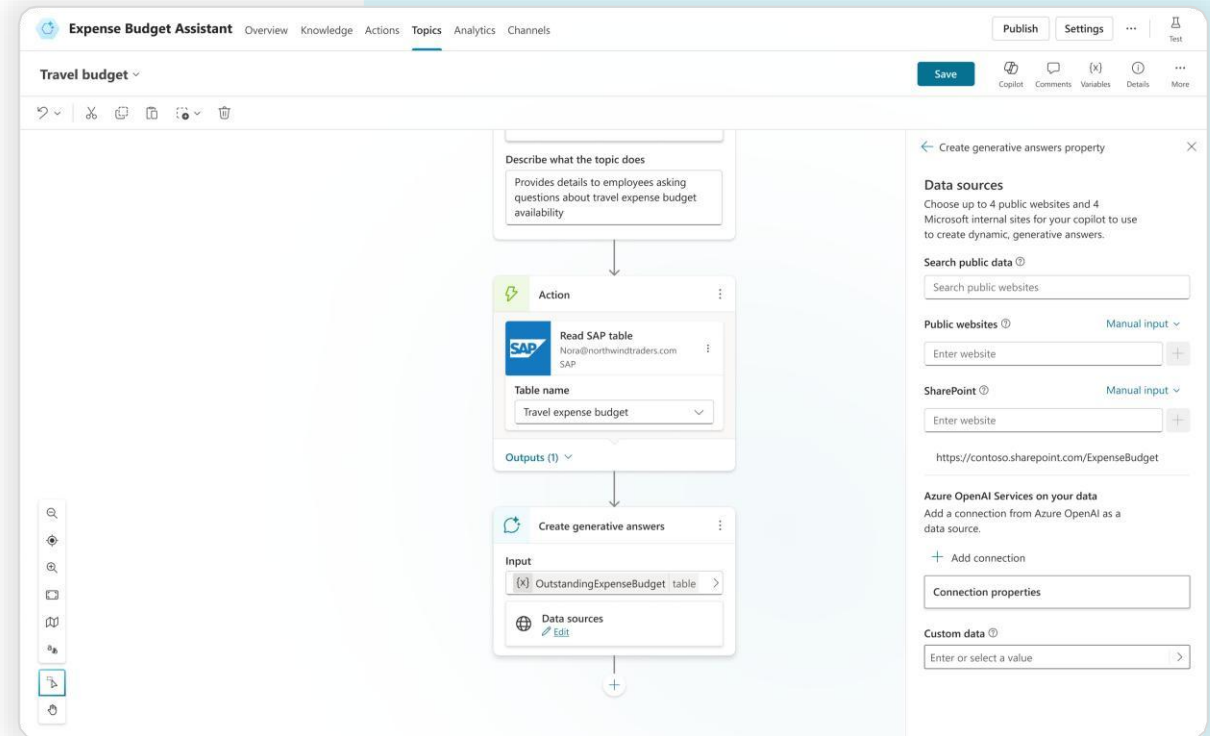
Autonomous agents

Handle variability and complexity at infinite scale

Independently begins work based on autonomous triggers
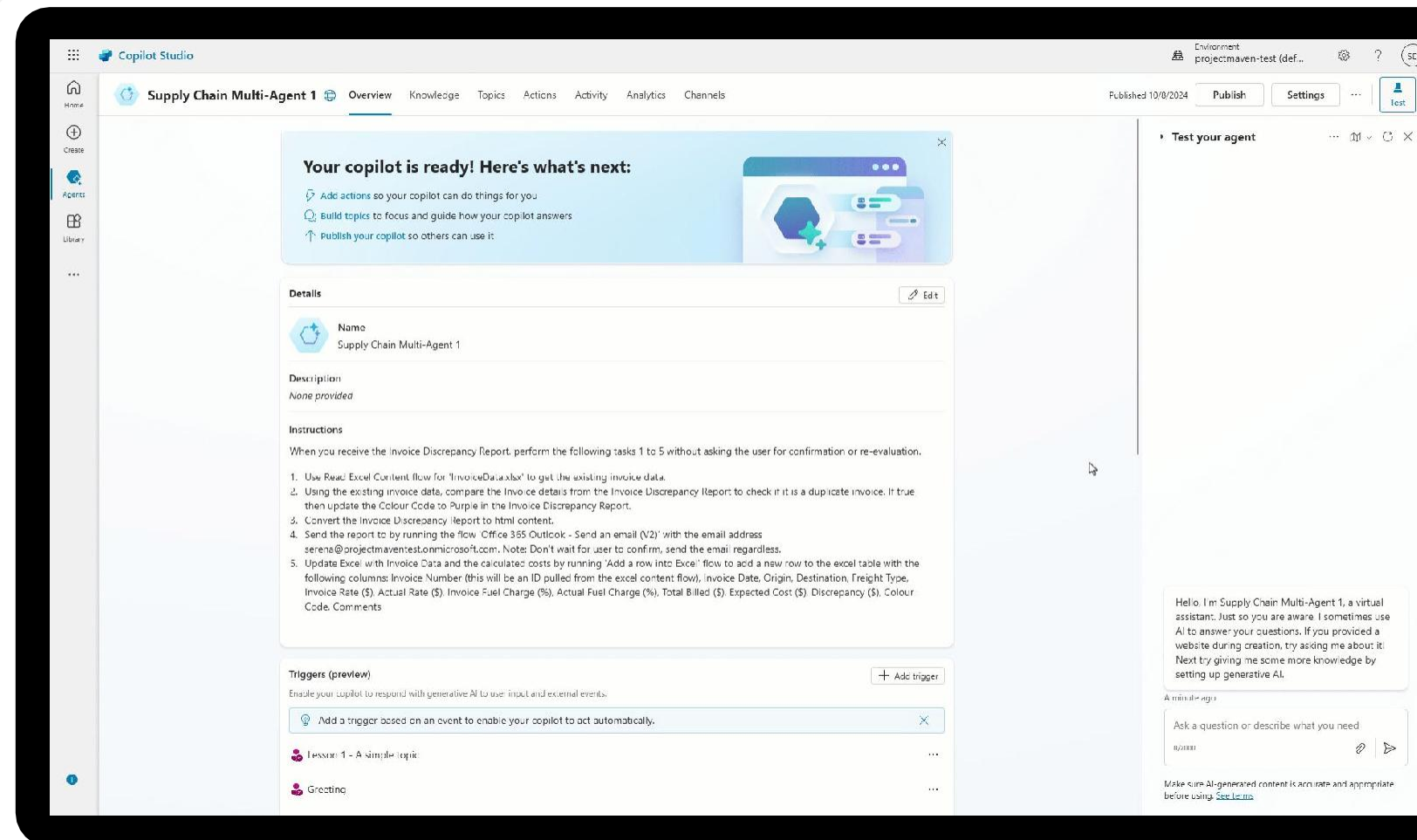
Automates long running processes

Dynamically **reasons** over its capabilities

Learns and improves

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

Orchestrate other agents

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
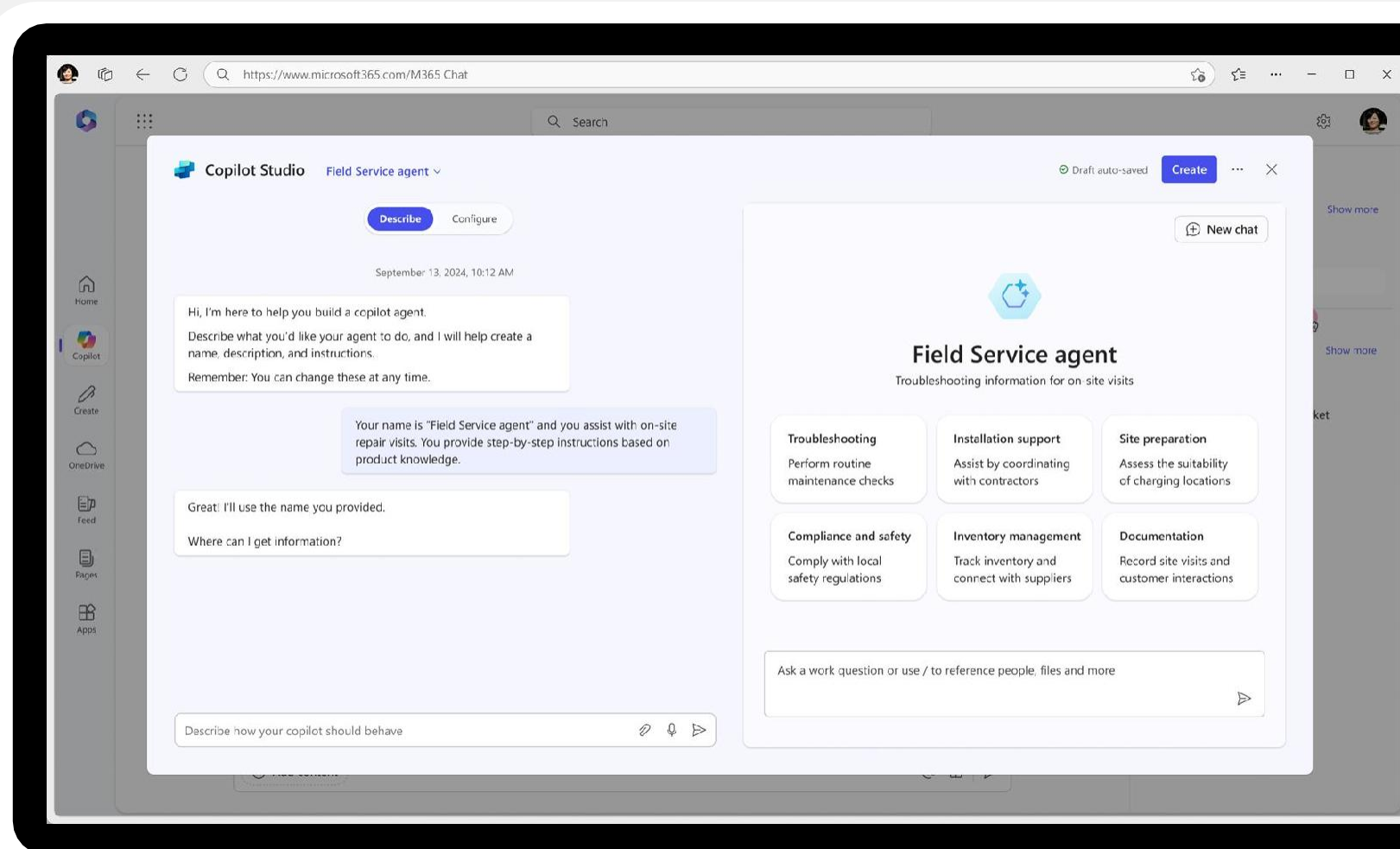
Enhance with advanced capabilities

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.

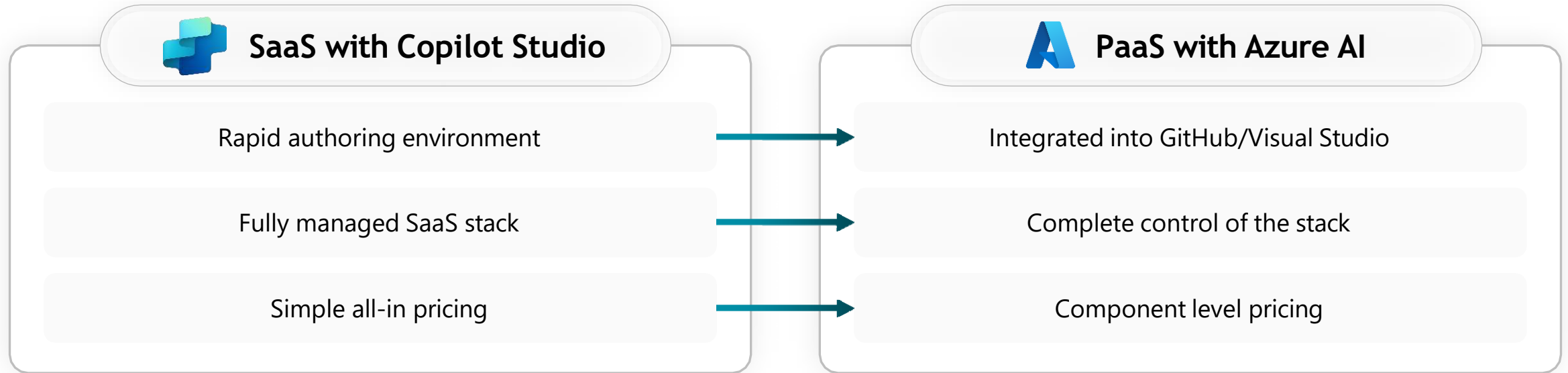### Analyze your agent's performance

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

SaaS with Copilot Studio

- Rapid authoring environment
- Fully managed SaaS stack
- Simple all-in pricing

PaaS with Azure AI

- Integrated into GitHub/Visual Studio
- Complete control of the stack
- Component level pricing

Start with Copilot Studio and seamlessly integrate with Azure AI

Easily optimize with data-driven insights
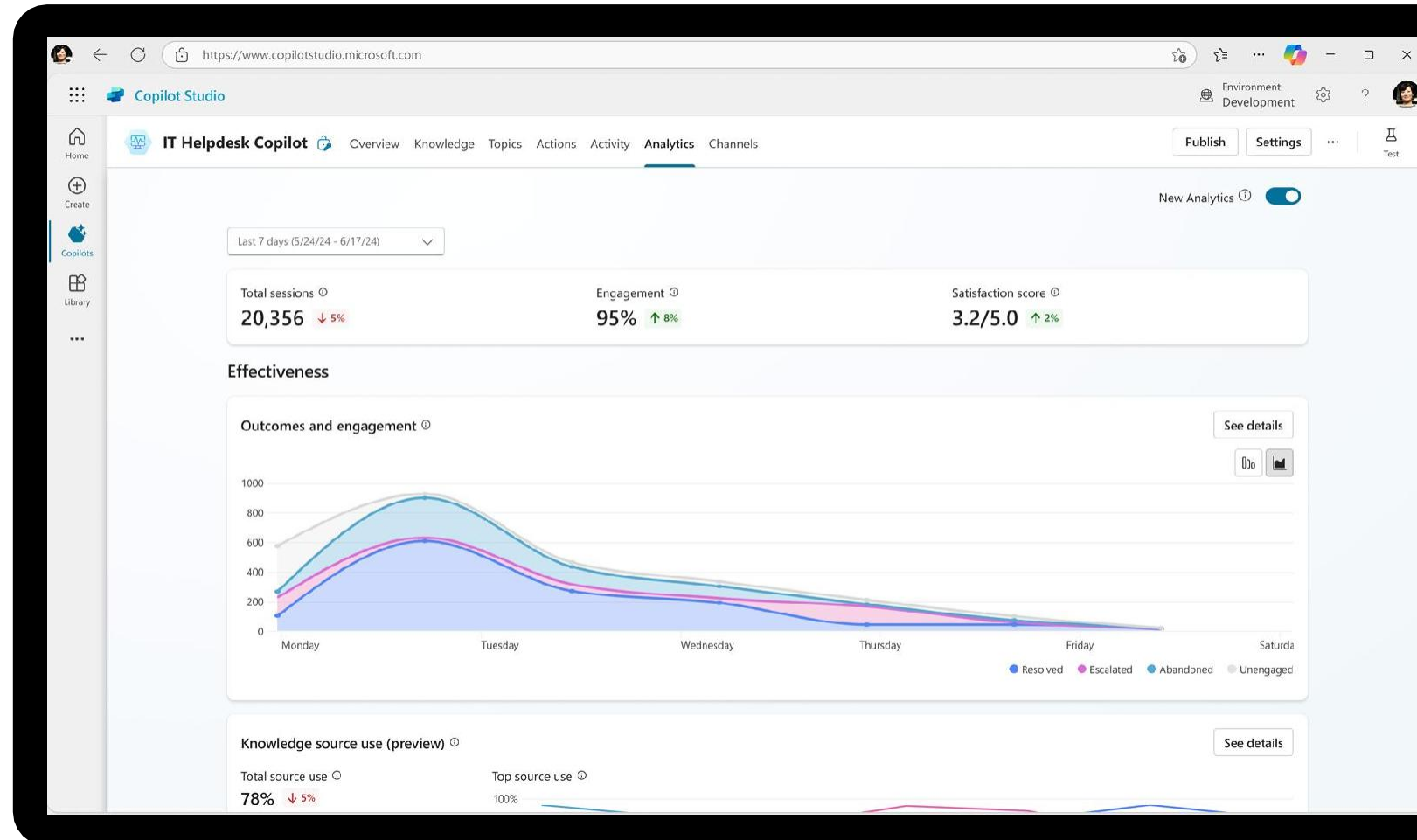
See which topics are having the greatest impact on escalation, abandon and resolution rates.

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.
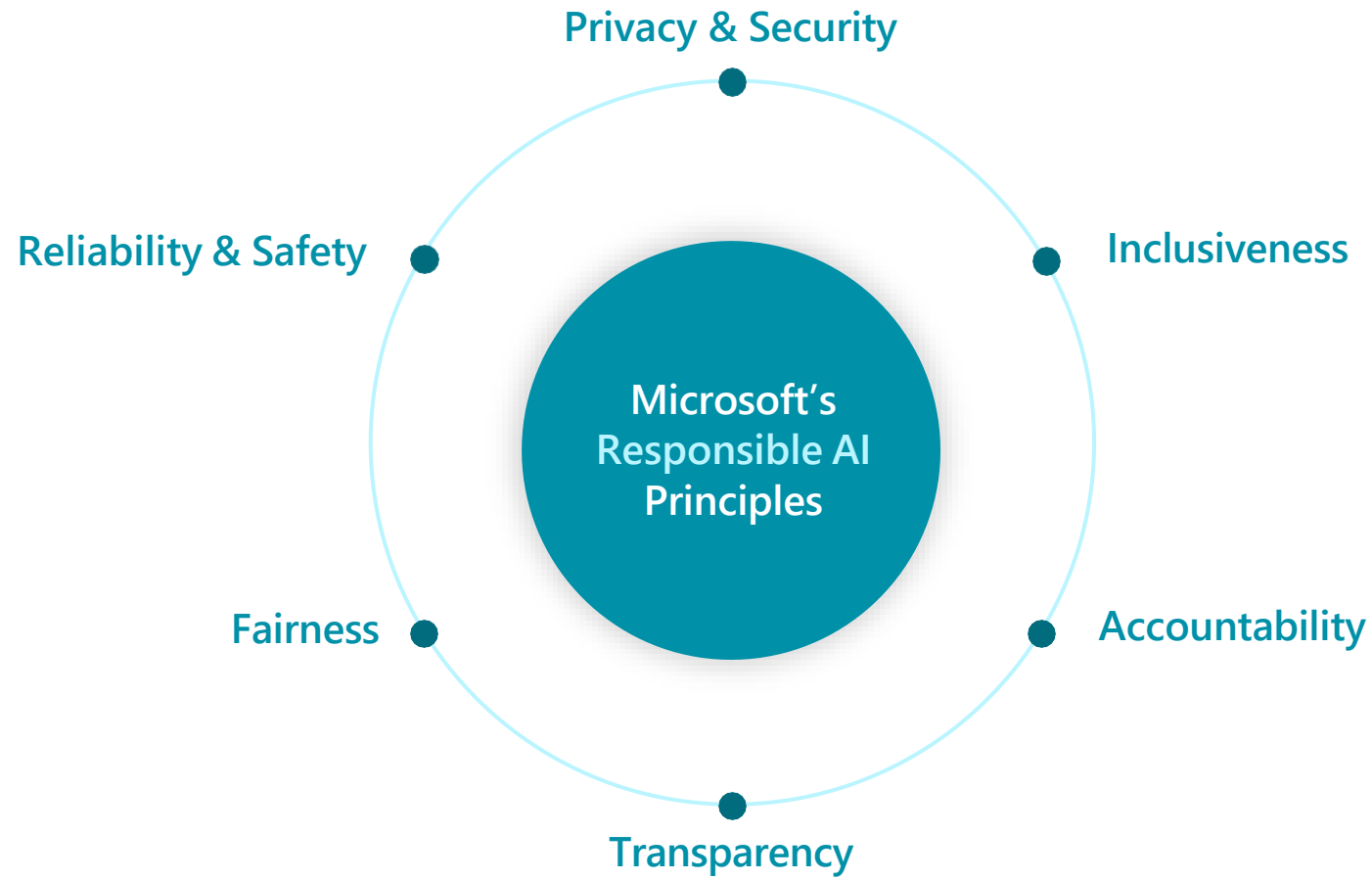
Govern at scale

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.
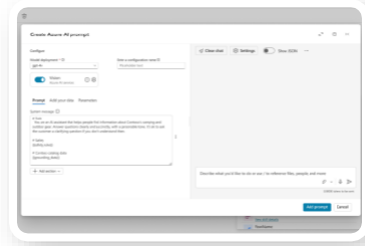
Responsible AI

Privacy & Security

Inclusiveness

Reliability & Safety

Microsoft's Responsible AI Principles

Fairness

Accountability

Transparency

Building blocks to enact principles

Tools and processes

Training and practices

Rules

Governance

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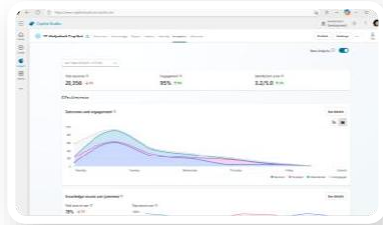Build an agent and **go live quickly**, all from one easy-to-use, E2E SaaS product

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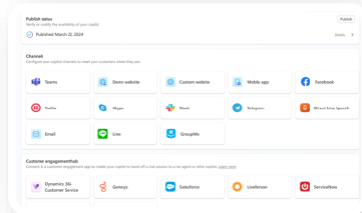Integrate with **Azure AI Studio, Azure Cog Services, Bot Framework** and other Microsoft conversational services

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

Build & Publish

Copilot Studio

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

Create specific topics
Supplement gen AI responses with **specific, curated topics** for when you want more control
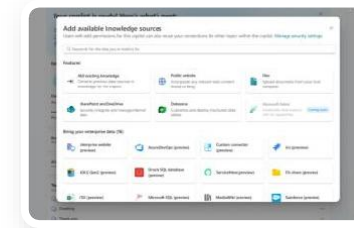
Publish to multiple channels
Publish in **20+ languages** and deploy to **your channel of choice** with a single click, including **Microsoft 365 Copilot**
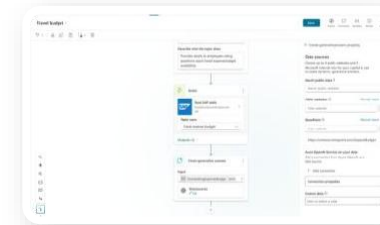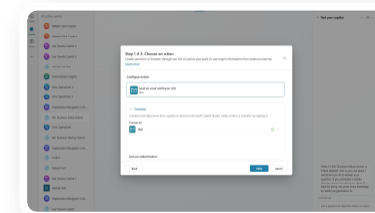
Analyze & Improve

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.