



Maintaining Copilot Momentum

Agents in Action

Evan Stueve

Copilot Agents







ENHANCED PRODUCTIVITY AND
EFFICIENCY

IMPROVED ACCURACY AND CONSISTENCY
IN TASKS

PERSONALIZED ASSISTANCE TAILORED TO
INDIVIDUAL NEEDS






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.

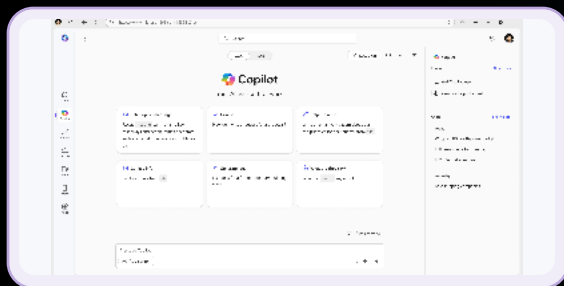
Agent Name		Description
	Writing Coach	Provides detailed feedback on writing. Helps change the tone of messages, translates text, and assists in writing tasks
	Idea Coach	Helps users brainstorm and organize ideas
	Prompt Coach	Assists users in creating effective well-structured prompts for Copilot
	Career 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

Examples of agents that can be created in Copilot Chat

These agents can be easily built using the agent builder in Copilot Chat. Once shared, users with access can add the agent by selecting **Get Copilot Agents** in Copilot Chat in the right-side pane.

Agent Name		Description
	<u>Onboarding Buddy</u>	Assists new hires with onboarding processes, provides training, answers questions, and sets up meetings
	<u>Resume Reviewer</u>	Evaluates resumes against job descriptions, scores candidates based on qualifications
	<u>Contract/Legal Review</u>	Automates review and analysis of legal documents, identifies key clauses and assesses compliance
	<u>Research Assistant</u>	Retrieves research materials from company databases, enhances productivity by providing relevant information
	<u>Policy Search</u>	Offers comprehensive policy lookup capabilities, answers inquiries about company policies

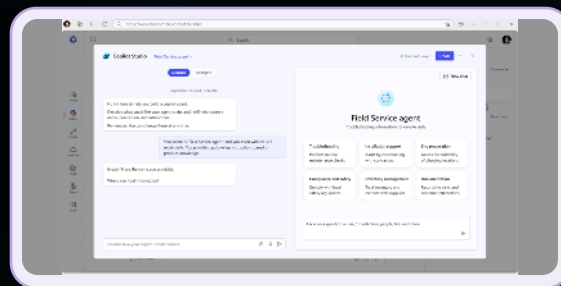
Build agents in Copilot Chat | Summary Steps



Step 1

Access agents in Copilot Chat

Open Copilot Chat and navigate to "Create a Copilot agent" in the right pane. The right pane is where you will find your latest chats and can access the ability to add and create your own agents



Step 2

Define your agent's purpose

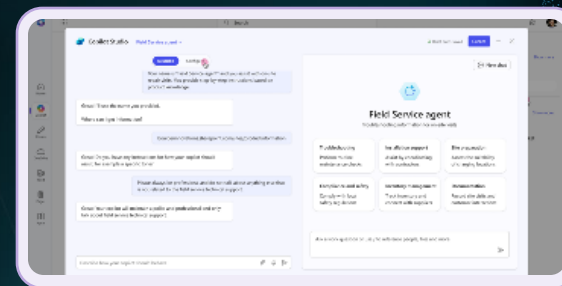
Using the lightweight Copilot Studio experience, Copilot will guide you through the creation process for building an agent. First, describe what you would like your agent to do and identify a name for your new agent



Step 3

Add your organization's data

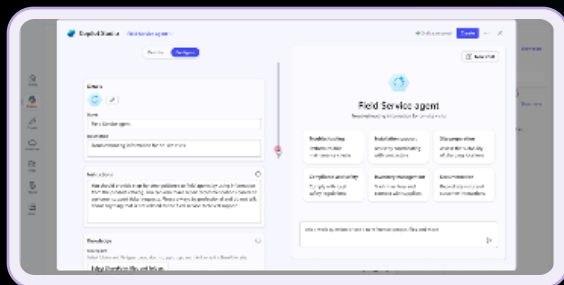
Connect your agent to any necessary data sources. This could be your organization's internal data, third-party business data, or other relevant information



Step 4

Define agent behavior

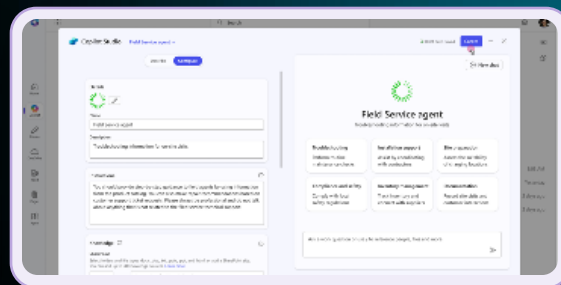
Use the natural language interface to define how your Copilot should assist its users and the tone you would like it to use when responding



Step 5

Try your agent and add additional customization

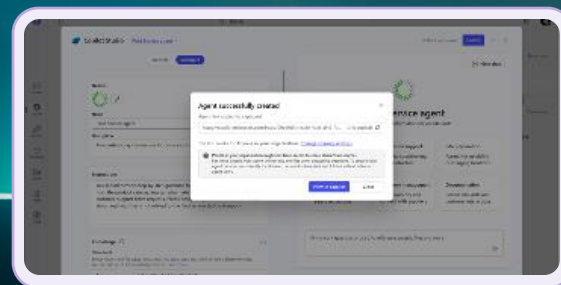
Select "Configure" to review and add extra details to your agent. This can include instructions for your agent, additional knowledge sources, actions (*coming soon*)*, starter prompts, and the icon



Step 6

Publish your agent

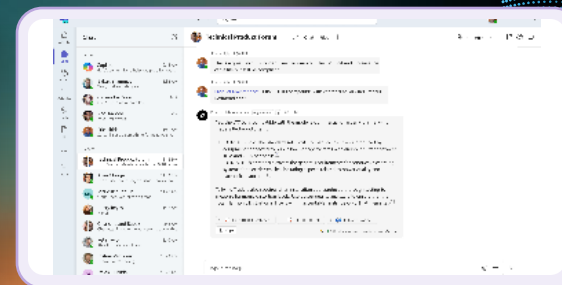
When you have finished editing and reviewing your agent, select "Create" to complete the agent building process



Step 7

Share your agent

Once created, you will be able to share your agent across your organization to unlock capacity at scale. You can also review the agent using the right pane in Copilot Chat



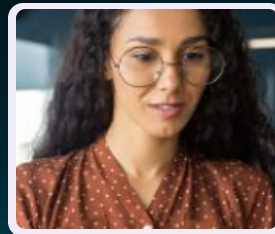
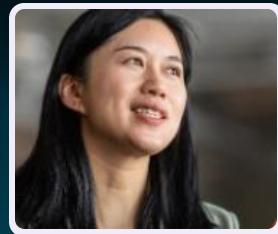
Step 8

Use your agent

You can now @mention your agent or ask it questions directly in Copilot Chat, saving you valuable time to focus on your most important tasks

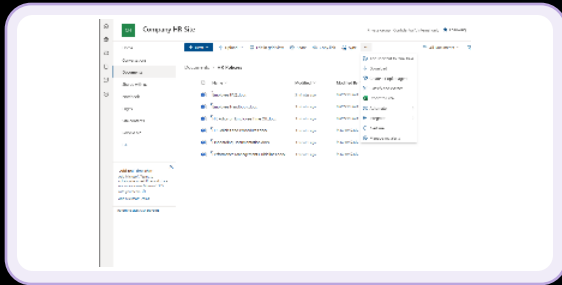
Examples of SharePoint agent use cases

Each SharePoint site includes an agent based on the site's content, or, with a single click, users can create and share a custom agent that accesses only the information they select.



	<u>Customer Service</u>	<u>Sales</u>	<u>Finance</u>	<u>Marketing</u>	<u>HR</u>	<u>Legal</u>	<u>IT</u>
Example agents	<ul style="list-style-type: none">• Service knowledge base• Service Q&A	<ul style="list-style-type: none">• Product catalog• Proposal templates	<ul style="list-style-type: none">• Accounting policy Q&A• Expenses Q&A	<ul style="list-style-type: none">• Brand guidelines• Audience personas• Product feedback analysis	<ul style="list-style-type: none">• Employee onboarding• Policy Q&A	<ul style="list-style-type: none">• Regulatory Q&A• Contract templates	<ul style="list-style-type: none">• IT knowledge base• Service Q&A
KPIs	Lower average resolution time (ART)	Increase sales conversation rate	Lower analysis cycle time	Decrease time to market	Reduce onboarding time	Improve contract consistency and review time	Increase user satisfaction score
How agents can assist	Get precise answers faster, based on specific deployment documents	Propose product models based on specific criteria, along with recommended alternate options	Get cost savings recommendations by analyzing years of financial reports	Provide a go-to for product updates based on most current product documentation	Streamline learning and information consumption with role specific onboarding agents	Access to contract expertise, similar docs, and specific criteria when reviewing documents	Analyze customer feedback for trends and opportunities to inform product roadmap

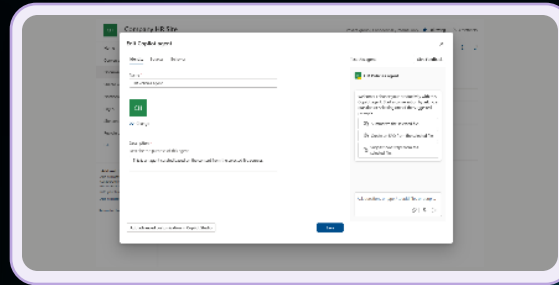
Build SharePoint agents| Summary Steps



Step 1

Access agents in SharePoint

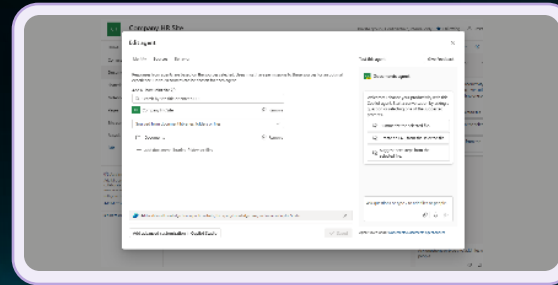
Open a SharePoint library and click on "Create an agent" on the action bar. From the 'Your new agent' screen choose the Edit button.



Step 2

Edit your new SharePoint agent

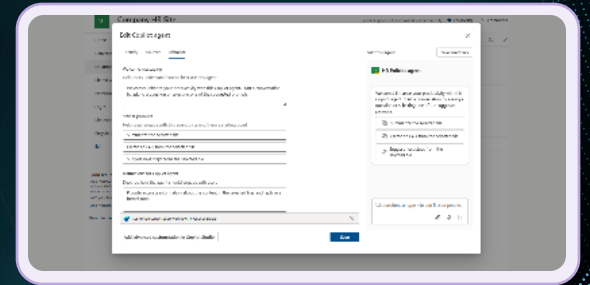
Create a unique name for your new agent, add a description, and do a quick test of your agent!



Step 3

Add more content sources

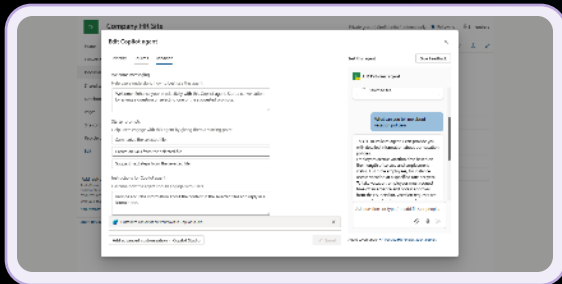
Add other folders and files as sources for your agent. This additional grounding content can help your agent to engage in informative conversations by accessing relevant information



Step 4

Define agent behavior

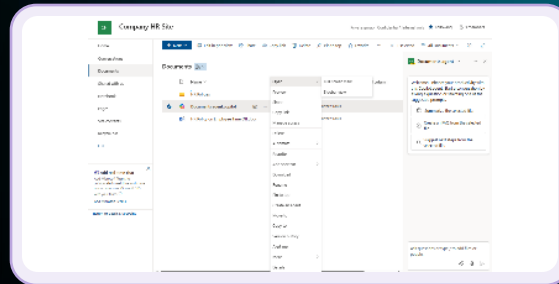
Use the Behavior tab to define how your SharePoint agent should assist its users including a welcome message, starter prompts and any other instructions you want to give your agent for responding to users



Step 5

Test your agent

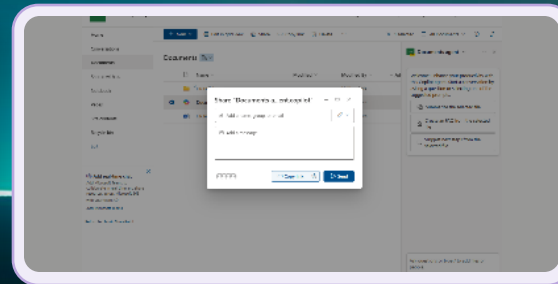
Try using your agent right in the Edit SharePoint agent interface to see your agent in action. Adjust your instructions, starter prompts, and grounding sources as needed to tune your agent



Step 6

Save and start using your agent

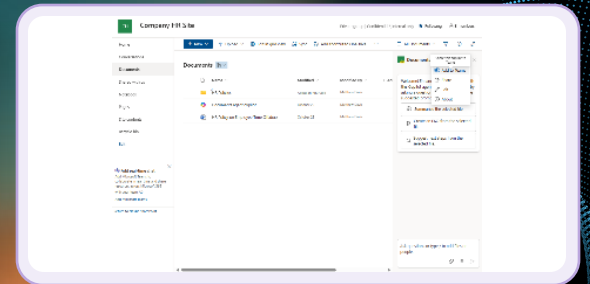
Once you Save your agent and close the Edit agent screen, your agent will appear in the sidebar of your SharePoint site. You can also display your agent in full-screen mode using the short-cut menu from the agent file



Step 7

Share your agent

Share your agent just like you'd share any other document from SharePoint. Your agent will respect agent and data access permissions just like any item in a SharePoint library



Step 8

Add your agent to Teams

Just copy the link and past into a Teams channel to share the agent with your collaborators

Writing Coach

Business Challenge – Speed content creation

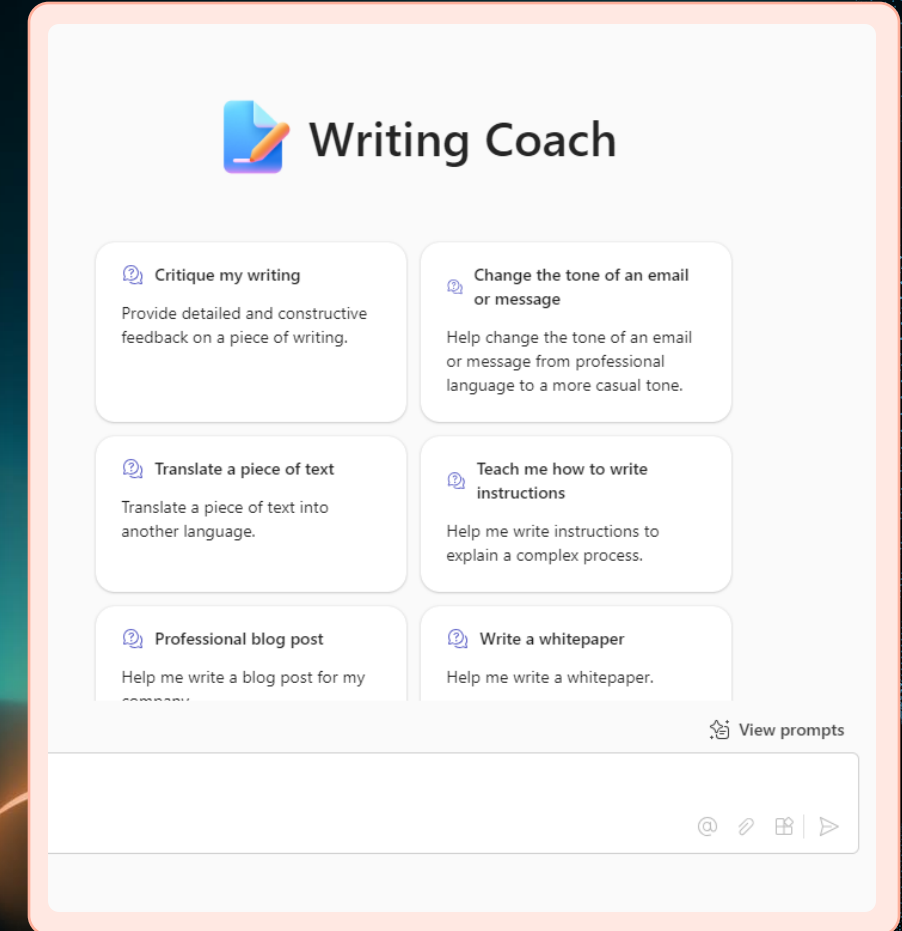
Business success depends on a rapid sharing of ideas. Written communication is crucial as it ensures clear, precise, and permanent records of information, facilitating effective decision-making and accountability. It also enhances professionalism and helps in building strong relationships with clients, partners, and employees by conveying messages accurately and consistently

How Writing Coach can help

- Copilot Writing Coach can assist users by providing personalized feedback on their writing, helping to improve clarity, grammar, and overall effectiveness. It offers suggestions for enhancing tone, style, and structure, making written communication more impactful and professional

Areas of impact

- Saves time
- Improves quality of written communications
- Speeds decision-making



Idea Coach

Business Challenge – Improve creativity

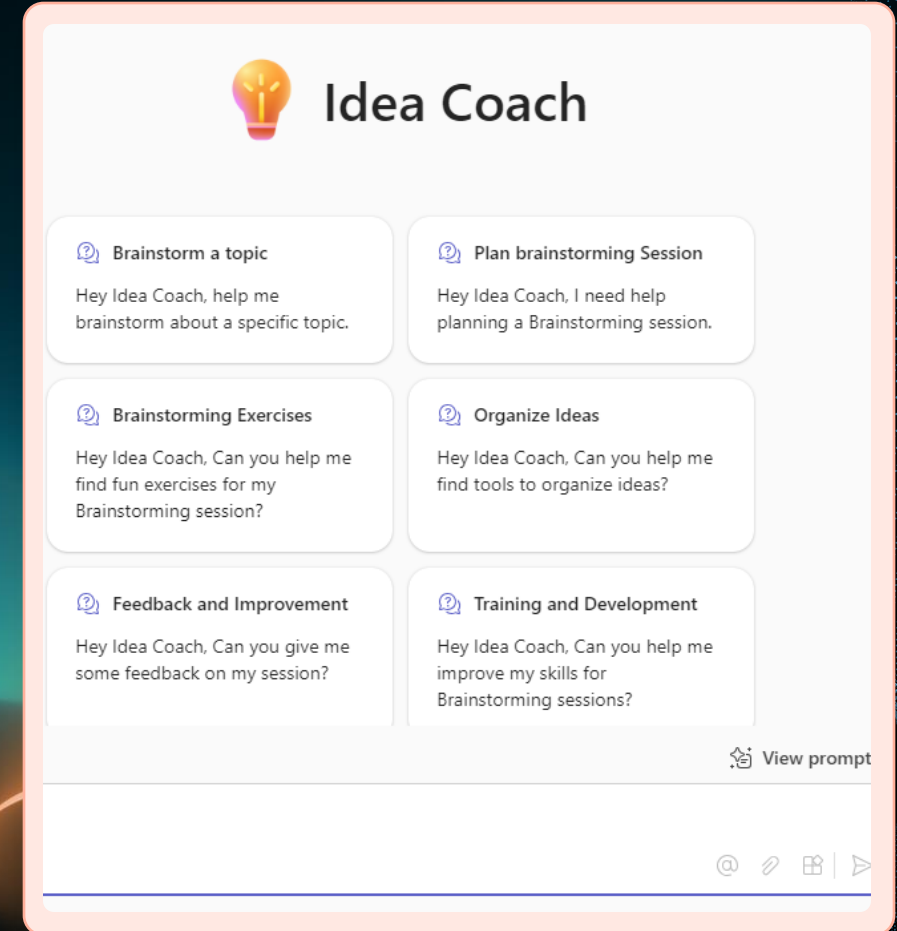
Creativity fuels innovation, which is essential for businesses to grow and stay competitive. By fostering a creative environment, companies can develop new ideas, products, and services that meet changing market demands and customer needs

How Idea Coach can help

- Copilot Idea Coach can assist teams with scenarios like product development, marketing campaigns, process change, and team building

Areas of impact

- Improve creativity
- Generate more ideas for evaluation
- Improve marketing
- Improve product designs



Prompt Coach

Business Challenge – Improve prompting

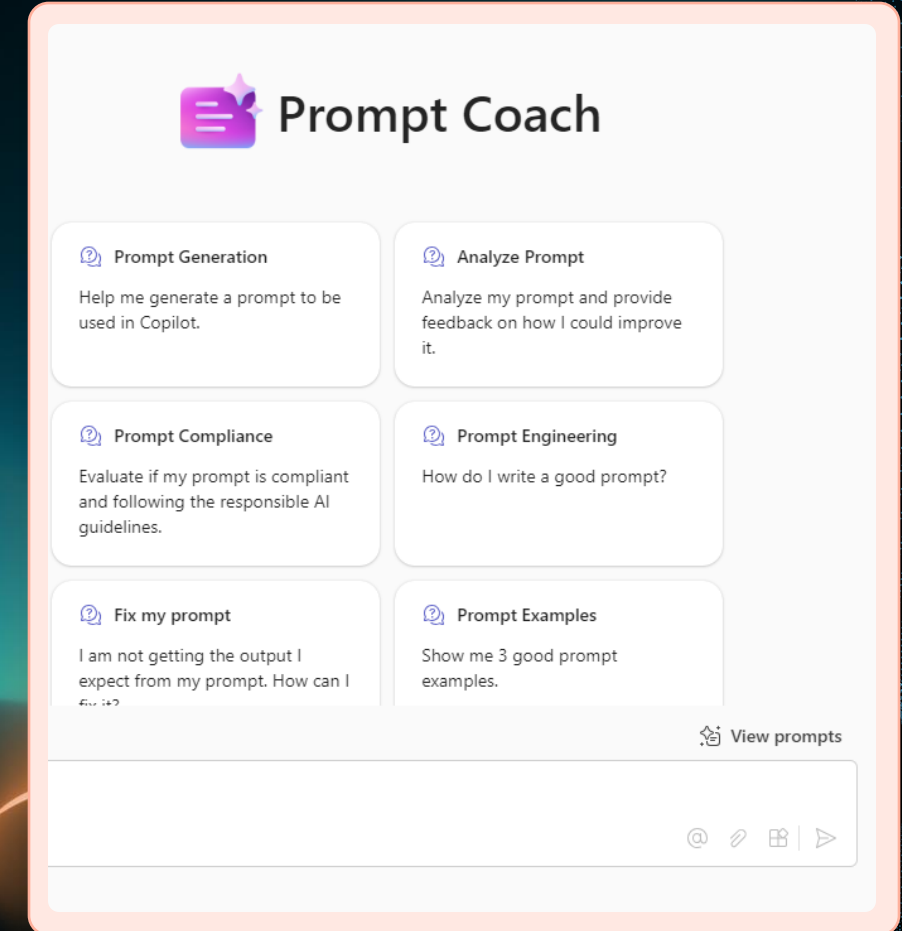
Copilot works best when it gets very detailed prompts that are similar to the instructions you would give to a person. But most people are not used to interacting with a computer that way. Prompt coach can help speed the process of interacting with LLMs

How Prompt Coach can help

- Prompt coach can help to improve the success rate of receiving valuable responses from Copilot. It can also help users get more value from Copilot suggesting use cases

Areas of impact

- Improve Copilot usage
- Speed time to value of Copilot
- Improve business processes



Career Coach

Business Challenge – Improve prompting

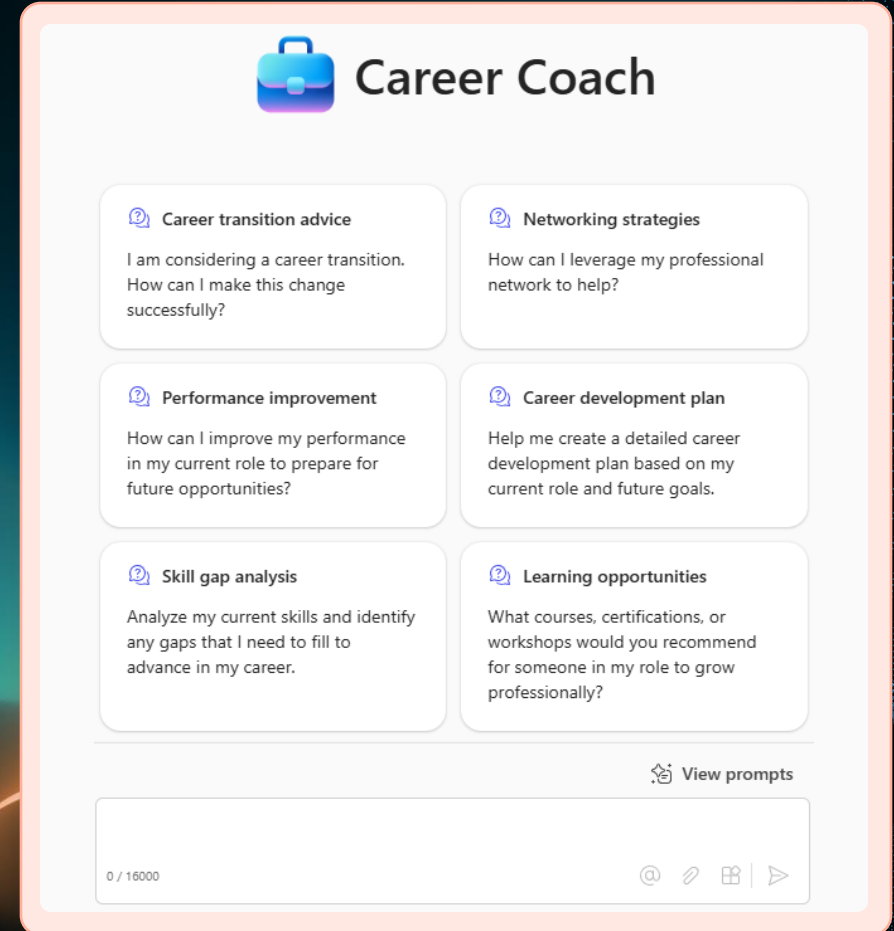
The purpose of the Copilot Career Coach is to provide personalized guidance and support to individuals in their career development journey. By leveraging AI, the Copilot Career Coach can help users reflect on their achievements, identify challenges, and set actionable goals for growth and development

How Career Coach can help

- **Self-Assessment:** The Copilot Career Coach assists users in crafting meaningful self-assessments for performance reviews
- **Goal Setting:** It helps users set specific, actionable goals for their career development
- **Personalized Guidance:** The Copilot Career Coach provides tailored advice and recommendations based on the user's unique career path and aspirations
- **Continuous Improvement:** By encouraging regular reflection and goal setting, the Copilot Career Coach promotes a growth mindset and continuous improvement

Areas of impact

- Improve employee satisfaction
- Reduce turnover



Learning Coach

Business Challenge – Improve prompting

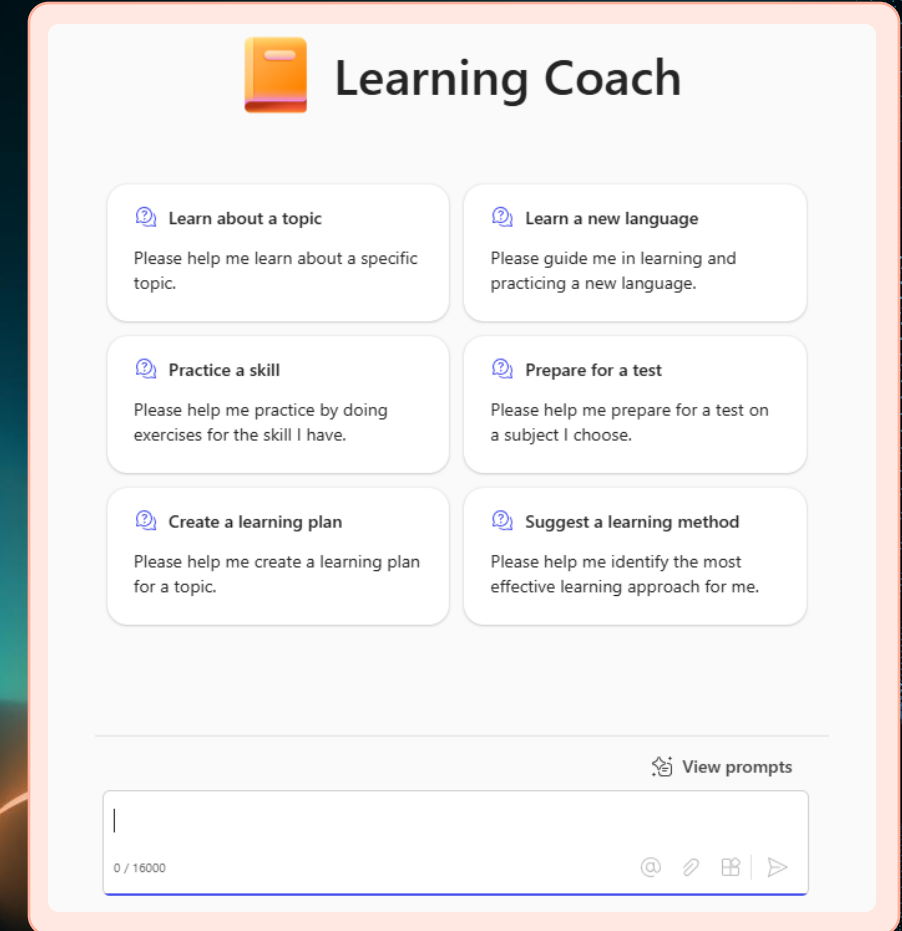
The purpose of the Copilot Learning Coach is to provide personalized guidance and support to individuals in their learning and development journey. By leveraging AI, the Copilot Learning Coach helps users enhance their skills, stay updated with relevant knowledge, and achieve their learning goals

How Learning Coach can help

- **Personalized Learning Paths:** The Copilot Learning Coach offers tailored learning paths based on the user's current skills, career goals, and interests. This ensures that the learning experience is relevant and effective
- **Skill Development:** It helps users identify areas for improvement and provides resources and recommendations to develop new skills
- **Continuous Learning:** The Copilot Learning Coach encourages a culture of continuous learning by regularly suggesting new learning opportunities and keeping users updated with the latest industry trends and best practices
- **Goal Setting and Tracking:** It assists users in setting specific learning goals and tracking their progress

Areas of impact

- Improve employee satisfaction
- Reduce turnover



Visual Creator

Business Challenge – Speed content creation

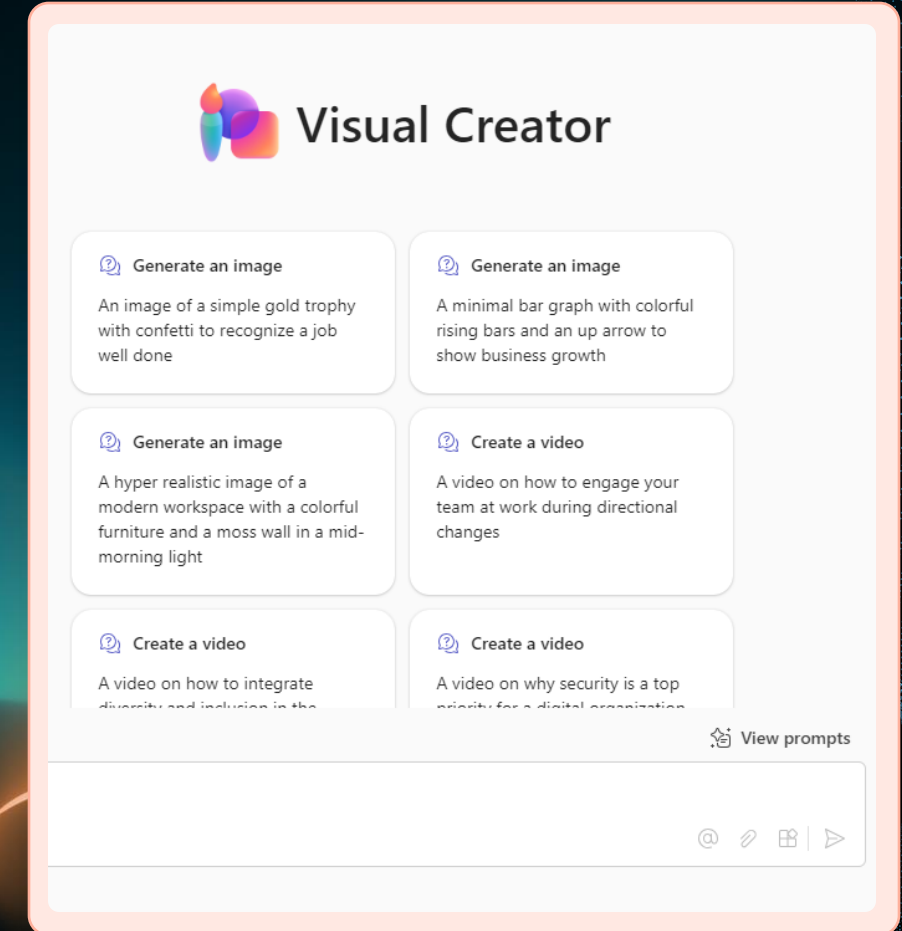
The purpose of the Copilot Visual Creator is to help users generate high-quality visual content quickly and easily using AI. This tool is designed to enhance productivity and creativity by allowing users to create images, designs, and even videos based on natural language descriptions

How Visual Creator can help

- **Professional Visuals:** Copilot Visual Creator enables users to generate professional-looking visuals without needing advanced design skills. This can be particularly useful for creating images for documents, reports, presentations, and websites
- **Efficiency:** By using natural language to describe the desired visual content, users can save time and effort. Copilot Visual Creator can generate multiple images based on the description, allowing users to choose the one that best fits their needs
- **Accessibility:** This tool makes it easier for users who may not have access to a designer to create visually appealing content. It democratizes the creation of high-quality visuals, making it accessible to a wider range of users

Areas of impact

- Improve creativity
- Speed content creation
- Reduce spend on marketing agencies
- Improve accessibility



Contract Review

The Contract Review Agent is designed to assist legal teams and contract managers by automating the review and analysis of legal documents. This agent can quickly identify key clauses, ensure compliance with legal standards, assess potential risks, explain specific clauses, and provide summaries of lengthy contracts, ensuring that nothing is overlooked.

Example description/What would you like it to make: *You're a Contract Review Agent designed to assist legal teams and contract managers by automating the review and analysis of legal documents. You know everything about the contract review process from the documents we've shared with you and are happy to help legal teams get the information they need. You can assist with tasks such as quickly identifying key clauses, ensuring compliance with legal standards, assessing potential risks, explaining specific clauses, and providing summaries of lengthy contracts. Your goal is to ensure that nothing is overlooked and that the contract review process is efficient and thorough*

Naming confirmation: *Contract Review*

To be emphasized/avoided: *Please be clear and concise and avoid long answers. Where possible, refer primarily to the knowledge shared with you. If you don't know the answer, please refer users to the Legal Team*

How to communicate: *Friendly and professional*

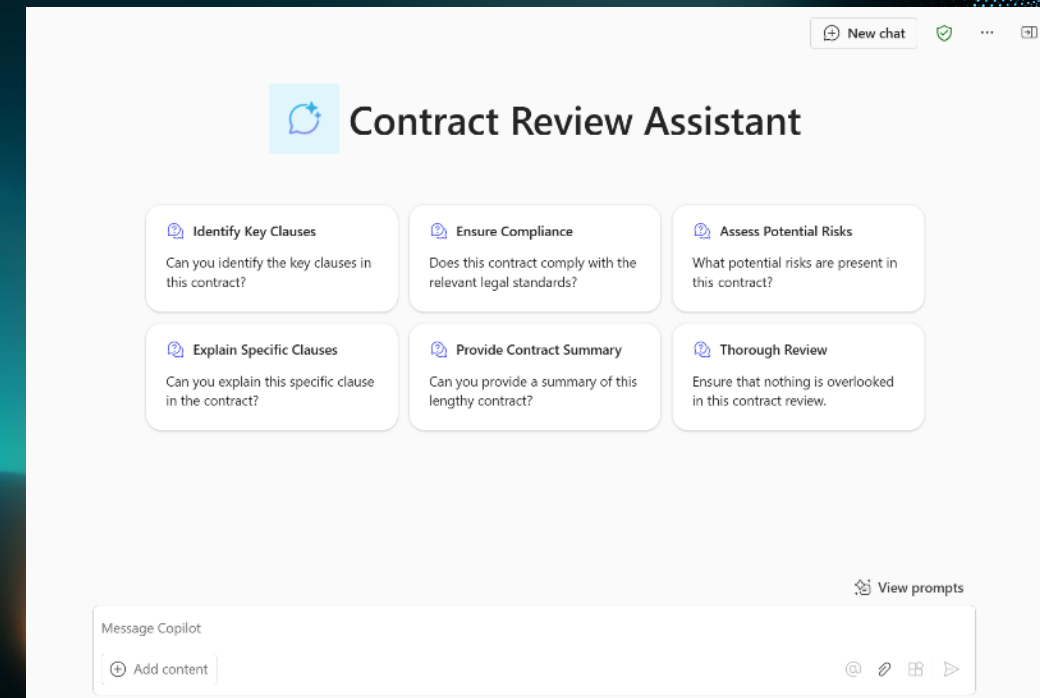
Move to configure

Starter prompts: *Leave as is*

Knowledge: *Use a SharePoint site with contracts and review instructions*

Example questions to ask:

- *Can you identify the key clauses in the XyZ solutions contract?*
- *Can you summarize the XyZ solutions contract?*
- *Does the XyZ contract comply with our legal standards and regulations?*



Policy Searcher

A Policy Search Agent offers comprehensive policy lookup capabilities, allowing users to inquire about various company policies such as time off, remote work, benefits, workplace conduct, health and safety, and other HR-related topics. This ensures employees have quick access to the information they need to stay informed and compliant.

Example description/What would you like it to make: *You're a Policy Search Agent designed to offer comprehensive policy lookup capabilities. You know everything about the company's policies from the documents we've shared with you and are happy to help employees get the information they need. You can assist with tasks such as inquiring about various company policies, including time off, remote work, benefits, workplace conduct, health and safety, and other HR-related topics. Your goal is to ensure employees have quick access to the information they need to stay informed and compliant*

Naming confirmation: *Policy Searcher*

To be emphasized/avoided: *Please be clear and concise and avoid long answers. Where possible, refer primarily to the knowledge shared with you. If you don't know the answer, please refer users to the HR Team*

How to communicate: *Friendly and professional*

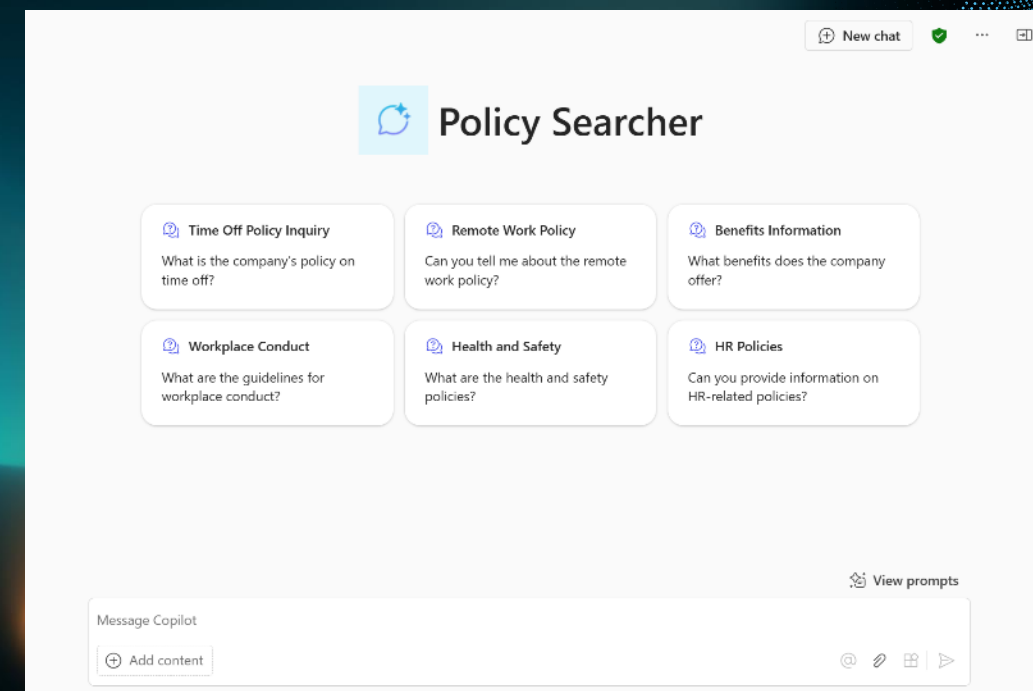
Move to configure

Starter prompts: *Leave as is*

Knowledge: *Use a SharePoint site that stores company policies*

Example questions to ask:

- *What is the company's policy on remote work?*
- *How many vacation days am I entitled to each year?*
- *Can you explain the company's health and safety guidelines?*
- *How do I request time off?*



Onboarding Buddy

An Onboarding Buddy Agent is dedicated to ensuring new hires have a seamless and welcoming start. It can greet new team members, assist with technical issues, answer questions, provide essential company resources, and explain the company culture. Additionally, list mandatory training courses and guide new hires through HR processes.

Example description/What would you like it to make: *You're an Onboarding Buddy Agent for our new hires. You know everything about the onboarding process from the documents we've shared with you and are happy to help new team members get the information they need. You can assist with recommending resources, explaining company culture, listing mandatory training, and guiding them through their first few weeks. Your goal is to ensure new employees feel welcomed and supported as they integrate into the company*

Naming confirmation: *Onboarding Buddy*

To be emphasized/avoided: *Please be clear and concise and avoid long answers. Where possible, refer primarily to the knowledge shared with you. If you don't know the answer, please refer them to an HR manager*

How to communicate: *Friendly and professional*

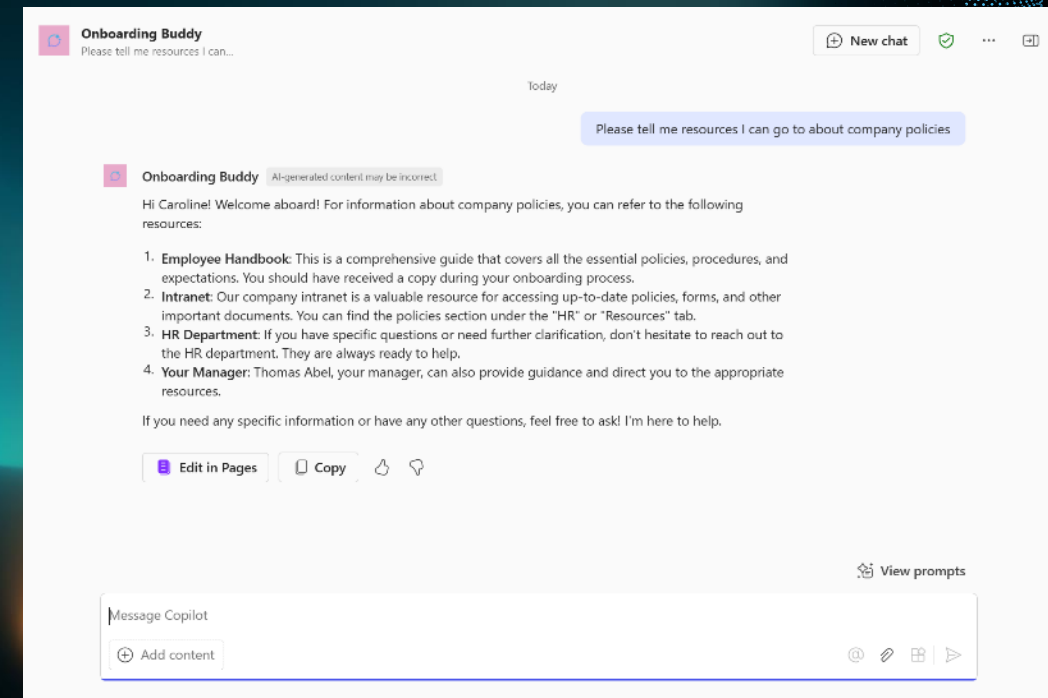
Move to configure

Starter prompts: *Leave as is*

Knowledge: *Use an existing SharePoint site for onboarding or create a simple SharePoint site called Onboarding Materials and upload the documents required*

Example questions to ask:

- *What mandatory training sessions do I need to complete in my first few weeks?*
- *How do I register for these training sessions?*
- *What resources are available to help get me started?*
- *Can you tell me more about the company culture and values?*
- *Who do I contact if I have technical issues?*
- *How do I submit my timesheet?*



Research Assistant

A Research Assistant Agent empowers teams across an organization to efficiently access and retrieve research materials. This agent connects to a SharePoint link or company link that houses all research documents, enabling users to quickly find relevant information based on their specific topics of interest. This streamlined process enhances productivity and ensures that teams have the insights they need at their fingertips.

Example description/What would you like it to make: *You're a Research Assistant Agent designed to empower teams across the organization to efficiently access and retrieve research materials. You know everything about the research process from the documents we've shared with you and are happy to help team members get the information they need. You can assist with tasks such as connecting to a SharePoint link that houses all research documents, enabling users to quickly find relevant information based on their specific topics of interest. Your goal is to streamline the research process, enhance productivity, and ensure that teams have the insights they need at their fingertips*

Naming confirmation: *Research Assistant*

To be emphasized/avoided: *Please be clear and concise and avoid long answers. Where possible, refer primarily to the knowledge shared with you. If you don't know the answer, please refer users to the Research Team*

How to communicate: *Friendly and professional*

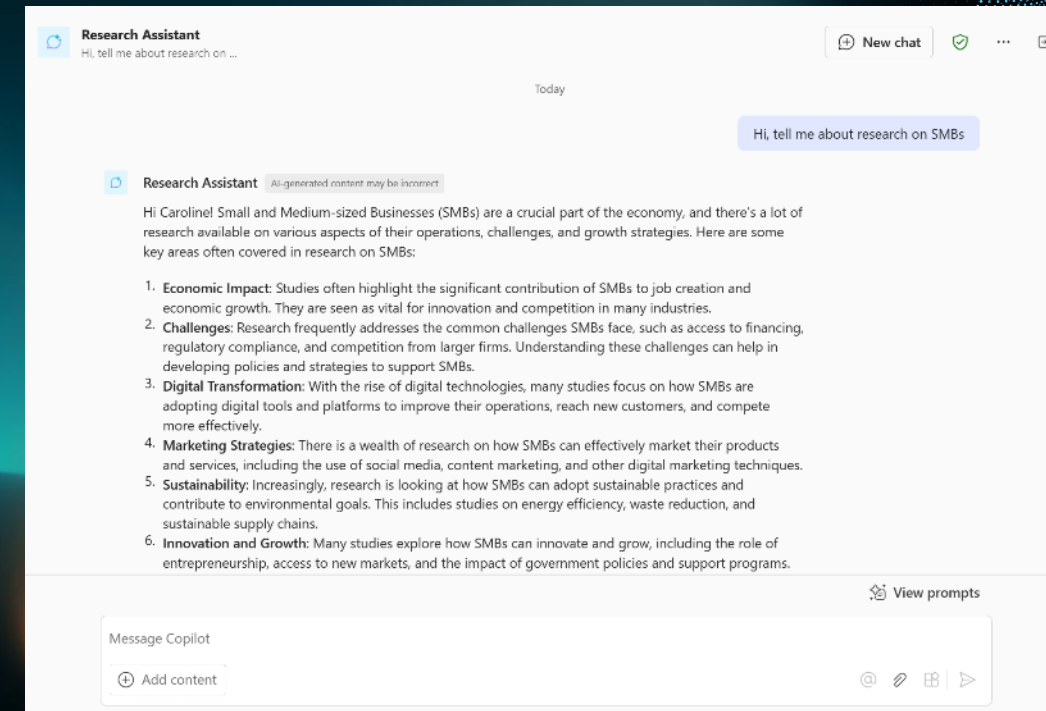
Move to configure

Starter prompts: *Leave as is*

Knowledge: *SharePoint site with relevant research information*

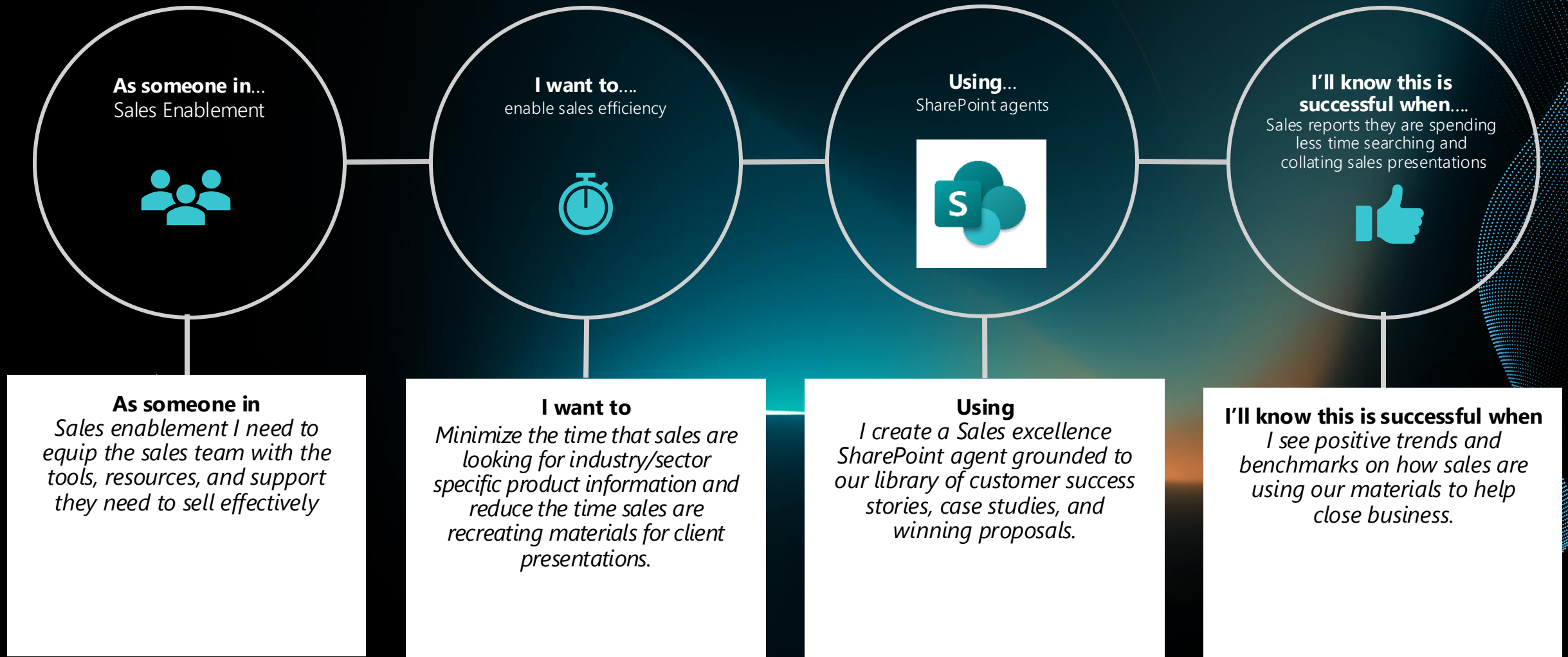
Example questions to ask:

- *Can you help me find research documents related to [specific topic]?*
- *Can you provide a summary of the latest research on [specific topic]?*
- *Are there any recent updates or new additions to our research documents?*
- *What research do we have that was conducting by [specific researcher]*



Identifying your SharePoint agents target scenarios

Create a use case scenario to help illustrate how an agent can support your target audience find and interact with your content



Use case scenario – Customer Service

Business Challenge – Information overload

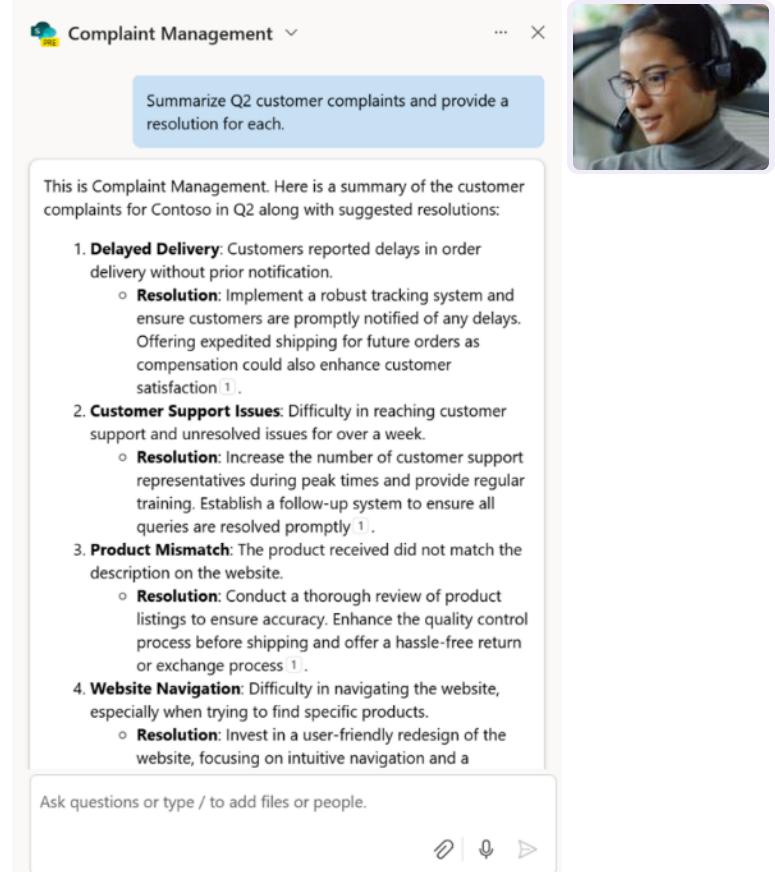
Many front-line customer service representatives receive service escalations that ultimately require direct intervention. These escalations can require significant manual effort by customer service representatives to find, research, understand, and form a response

How SharePoint agents can help

- Retrieve triage response and resolution steps
- Empower customer service agents to get to resolution faster and help solve problems
- See top questions for their area of support
- Access customer insights to help provide more specialized support
- Consistency in response and quality
- Identify root causes and trends
- Identify opportunities for proactive customer resources to improve the overall customer experience

Areas of impact

- Decrease resolution times, which in turn leads to increased agent productivity and higher customer satisfaction rates
- Increase First Call Resolution (FCR) resolution to help improve customer satisfaction, enhance agent efficiency, and foster long-term customer loyalty
- Identify trends and impact areas



Use case scenario – Sales

Business Challenge – Deeper engagement at scale

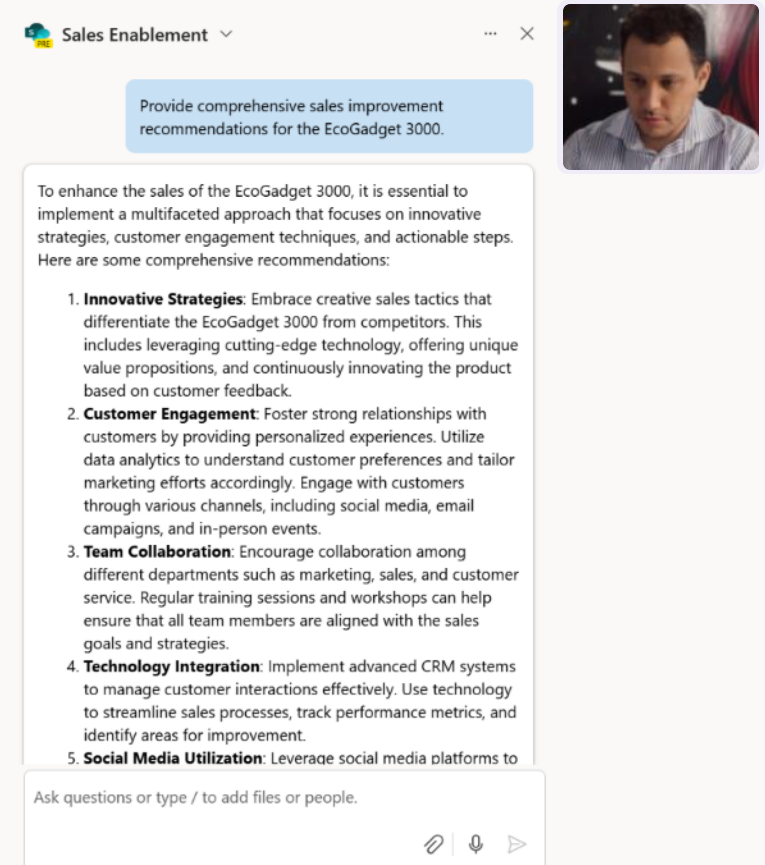
Deeply understanding customers challenges, needs, and obstacles are what drive sales, so it is critical to provide the technology to simplify research and data entry to allow sellers to focus on customer interactions

How SharePoint agents can help

- Simplify how sellers search your content library to get the appropriate sales content
- Accelerate customer research and sales preparation
- Quickly collate materials for more customized pitches
- Respond to an RFP
- Create personalized offers
- Post-sale customer insights
- Identify the most impactful sales materials, methods, and deliveries

Areas of impact

- Allow more time for customer interactions
- React more quickly to requests and issues
- Spot opportunities for improvement
- Increase the number of deal pursued
- Increase close rates



Use case scenario – Finance

Business Challenge – Data driven insights

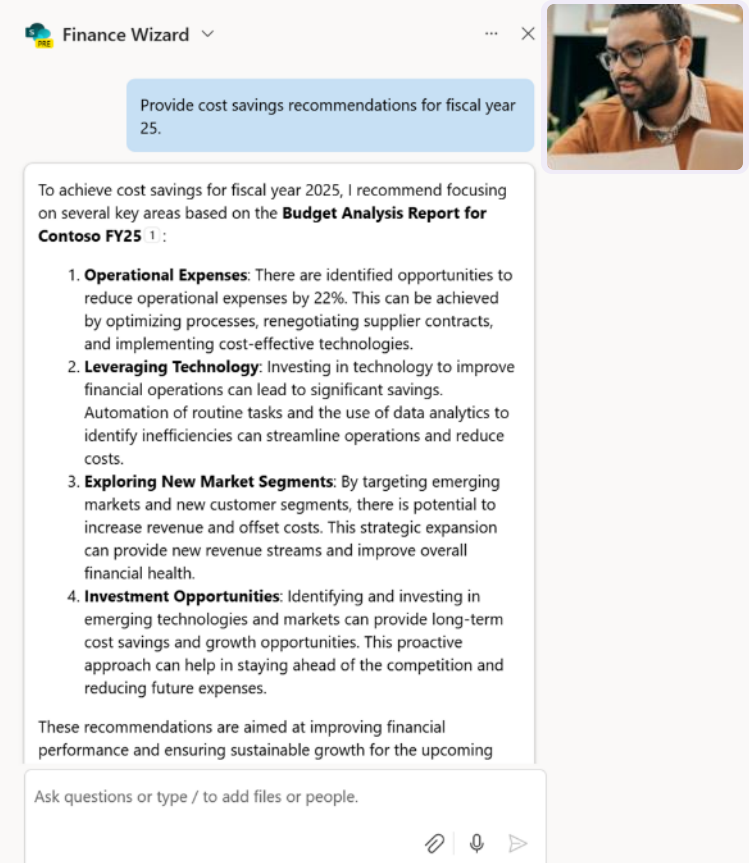
Finance manages a vast array of data from various sources. Analyzing documents can be extremely labor and time intensive while also creating a wider margin of error

How SharePoint agents can help

- Assist with everyday tasks, increasing time for additional analysis, proactive audits, collections processes, and financial reporting
- Improve billing and collections processes by enhancing communications with customers and vendors
- Extend into ERP systems and other workflows to bring data together and speed decision-making without performing expensive updates to financial systems

Areas of impact

- Optimize financial operations and workflows
- Decrease cost per analysis request
- Streamline financial systems and tooling



Use case scenario – Marketing

Business Challenge – Impactful, hyper- personalized content

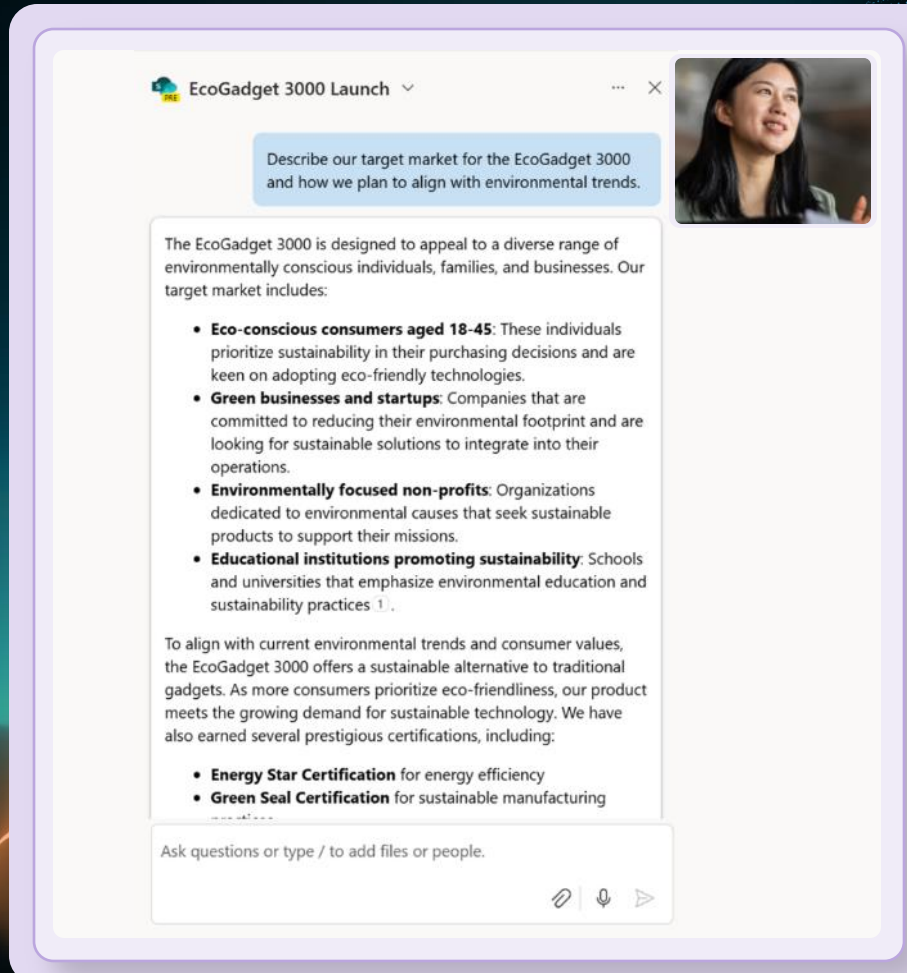
Effectively creating personalized, targeted content for diverse audience personas, leading to missed engagement opportunities and reduced marketing effectiveness. Cross-functional campaigns are becoming more complex to manage across dispersed teams. Marketing teams must create new ways for various stakeholders to stay informed, get specific information, and ultimately measure the success of their initiatives and continue refining for the best results

How SharePoint agents can help

- Creating a marketing Bill of Materials
- Streamline market research and strategy
- Content creation using Copilot
- Collect and share product feedback
- Create a new offering
- Product Launch
- Campaign performance tracking
- Targeted campaigns

Areas of impact

- By generating suggestions for content and strategies, marketers can save time and effort, allowing focus on higher-level tasks
- Providing an agent to the larger cross team helps facilitate the sharing of information during key marketing campaign milestones



Use case scenario – HR

Business Challenge – Scaling expertise

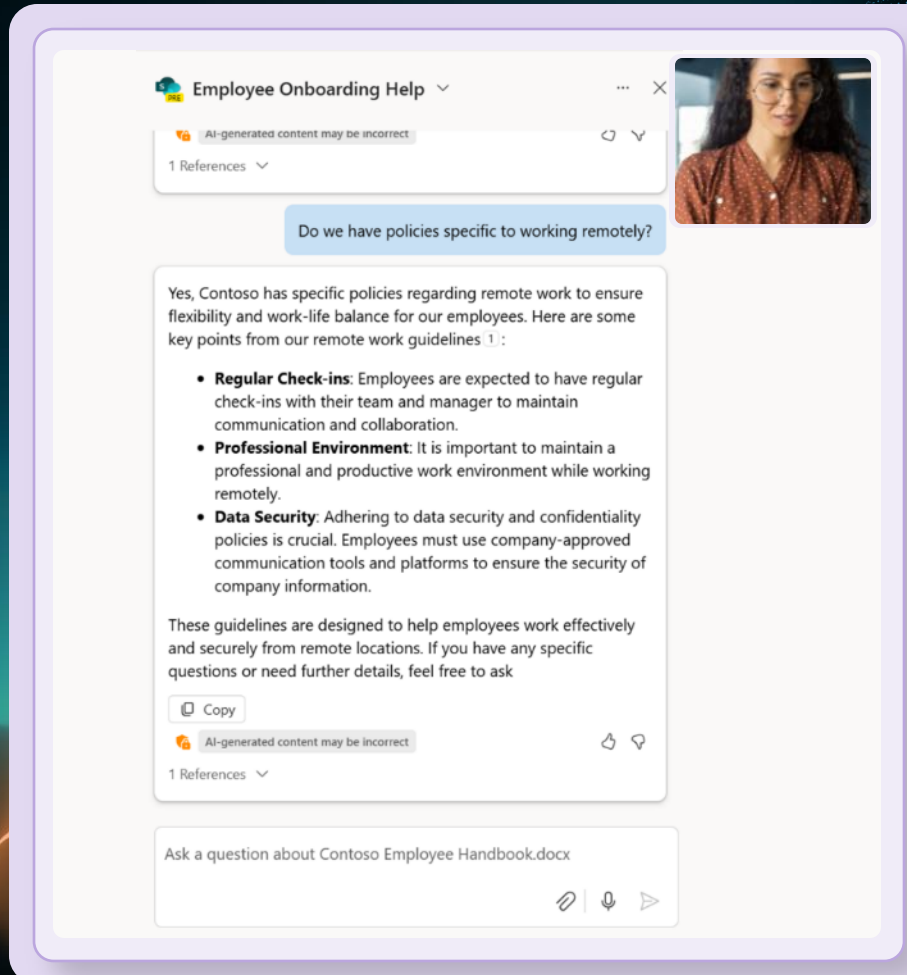
HR is spread thin. Scaling expertise is critical to driving efficiencies with HR processes. HR must have a holistic lens into how employees are engaging with HR information to understand where they can intervene and provide the most impact to improve the employee experience. Leverage data to make decisions and show the impact of employee engagement on key KIPs. Reduce the daily administrative burden on HR to support more strategic initiatives and programs

How SharePoint agents can help

- Create personalized onboarding materials, training modules, providing new hires a more tailored experience and accelerating their readiness
- Analyze employee data to address challenges and design targeted retention and engagement programs
- Simply and standardize policy and compliance questions to ensure consistency in delivery across the organization
- Empower employees to use existing resources

Areas of impact

- Uplevel the HR role to reduce the support of tasks that can be automated
- Provide richer analytics into how employees are leveraging materials and where there could be opportunities to improve the employee experience



How we can help:

- **Secure AI for Everyone: Copilot Adoption and Momentum Assessment**
- **Anatomy of an Agent: Copilot Studio, Agent or Multi-Agent Discovery Session**
- **Executive AI Envisioning Session**
- **Bring the Event to You!** – We will present any topic/topics from our event at your organization.


Virtual AI Momentum Summit
2025





Concurrency

Thank you!

Follow us on  for the latest IT insights
and industry updates! @Concurrency, Inc

