Welcome back!

Microsoft Belux Partner Update Call

Update Call #17
June 20th, 2025

Yves Kerwyn – Proud Member of the Microsoft Belux Partner Community

Microsoft

About myself, **Yves Kerwyn**

- ✓ Passion for people & technology with business acumen
- ✓ Gets energy from making others successful
- ✓ Loves to communicate, train and evangelize
- ✓ Always eager to push the bar (read: learn)
- ✓ Solid Microsoft-background
- ✓ Cross-workload certified

Worked for 17 years as FTE at Microsoft in various roles:

- Solution Sales Professional, Partner Sales Executive
- Partner Technology Strategist, Developer Evangelist
- Product Marketing Manager

Currently active as:

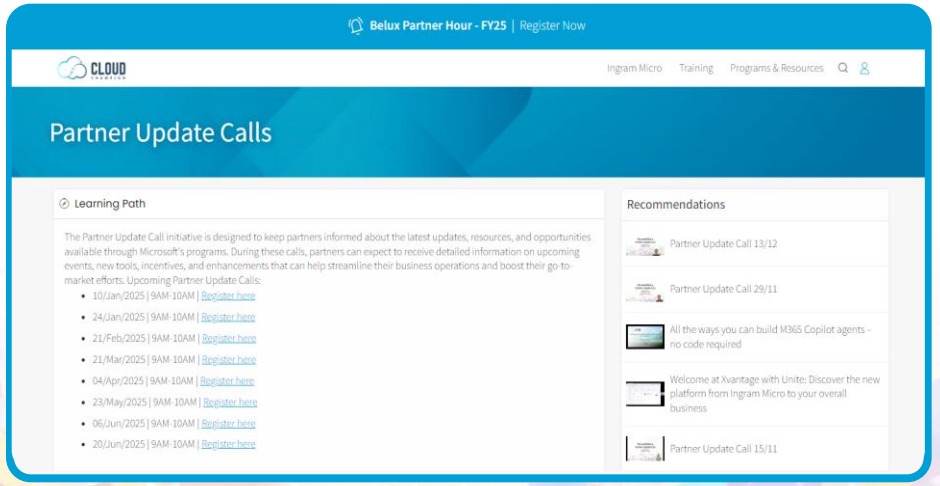
- Competence Developer & Speaker for Microsoft
- Microsoft Certified Trainer (MCT) for Azure, Microsoft 365, Power Platform & Dynamics 365 Customer Engagement apps

Microsoft Partner Community

Partner Update Calls in 2025

https://aka.ms/**beluxsmb** → https://www.**cloudchampion**.be/c/**partner-update-calls**

#	Date	Registration Link
10	January 10	Link #10
11	January 24	Link #11
12	February 21	Link #12
13	March 21	Link #13
14	April 4	Link #14
15	May 23	Link #15
16	June 6	Link #16
17	June 20	Link #17



https://aka.ms/**beluxsmb**

Belux Partner Hour - FY25 | Register Now

CLOUD CHAMPION

Ingram Micro Training Programs & Resources

Partner Update Calls

Learning Path

The Partner Update Call initiative is designed to keep partners informed about the latest updates, resources, and opportunities available through Microsoft's programs. During these calls, partners can expect to receive detailed information on upcoming events, new tools, incentives, and enhancements that can help streamline their business operations and boost their go-to-market efforts. Upcoming Partner Update Calls:

- 10/Jan/2025 | 9AM-10AM | Register here
- 24/Jan/2025 | 9AM-10AM | Register here
- 21/Feb/2025 | 9AM-10AM | Register here
- 21/Mar/2025 | 9AM-10AM | Register here
- 04/Apr/2025 | 9AM-10AM | Register here
- 23/May/2025 | 9AM-10AM | Register here
- 06/Jun/2025 | 9AM-10AM | Register here
- 20/Jun/2025 | 9AM-10AM | Register here

Partner Update Call 23/08

1:16:11

Recommendations

Partner Update Call 13/12

Partner Update Call 29/11

All the ways you can build M365 Copilot agents – no code required

Welcome at Xvantage with Unite: Discover the new platform from Ingram Micro to your overall business

Partner Update Call 15/11

What will be covered today?

- FY26 MCAPS Start for Partners & GTM Kickoff
- Microsoft Sovereign Cloud
- AI Agent Adoption Hub
- News about the Researcher agent
- News about Copilot Chat
- Redesigned Copilot Hub

What will be covered today?

- **FY26 MCAPS Start for Partners & GTM Kickoff**
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Event	Focus	Target Audience	Content Type
MCAPS Start for Partners (July 15, 2025)	Strategic vision, AI innovation, FY26 priorities	All Microsoft partners	Executive keynotes, strategic updates, digital breakout sessions
FY26 GTM Kickoff Event (July 22, 2025)	Go-to-market execution, sales & marketing alignment	GTM, marketing, and sales-focused partners	Practical GTM plans, execution strategies, product-specific insights

✓ **MCAPS Start for Partner** | **July 15**
This is designed to empower, energize, and center our global Microsoft Customer and Partner Solutions (MCAPS) sales organization, giving partners the tools and skills to get a quick start to success in the new fiscal year. Our partners are an extension of our sales force, and so we are inviting you to participate in the momentum through a dedicated digital experience designed for your business. MCAPS Start for Partners will make it easier for you to engage, build, and sell with Microsoft by providing you with the information you need to grow your business with us in the year ahead.

https://aka.ms/**mcapsstartpartners**

✓ **Microsoft Partner FY26 GTM Kickoff Event** | **July 22**
Find out what topics our Microsoft leaders will dive into on Tuesday, July 22 to help partners navigate the growing opportunity around AI-powered business solutions. We'll have live and on-demand content across Modern Work and Business Applications System Integrator GTM.

https://aka.ms/**partnergtmfy26**

MCAPS Start for Partners

- MCAPS = Microsoft Customer and Partner Solutions
- MCAPS = name of the sales organization within Microsoft
- MCAPS Start = Microsoft internal sales readiness event
- MCAPS Start for Partners = same, but then for partners
- Join us digitally for MCAPS Start for Partners on **July 15th** at 5 PM CET.
- Learn directly from Microsoft senior leaders on what's ahead:
  - ✅ FY26 priorities
  - ✅ Program investments and updates
  - ✅ AI growth opportunities
- See LinkedIn post of Nicole Dezen: https://partner.microsoft.com/blog/article/mcaps-start-for-partners-2025

Build, invest, and win together at MCAPS Start for Partners!

Nicole Dezen
Chief Partner Officer and Corporate Vice President, Global Partner Solutions

Jun 12, 2025 • 2 min read • Events

We are excited to invite our global partner ecosystem to **MCAPS Start for Partners**, a digital event broadcast on **July 15, 2025, at 8:00 AM PT**. This exclusive experience marks the start of our new fiscal year, a pivotal moment to share new investments and capability and equip you with the data, insights, and resources needed to drive mutual growth and success. **Register now.**

At the start of our fiscal year, Microsoft hosts a sales readiness event, MCAPS Start. This is designed to empower, energize, and center our global Microsoft Customer and Partner Solutions (MCAPS) sales organization, giving partners the tools and skills to get a quick start to success in the new fiscal year. Our partners are an extension of our sales force, and so we are inviting you to participate in the momentum through a dedicated digital experience designed for your business. MCAPS Start for Partners will make it easier for you to engage, build, and sell with Microsoft by providing you with the information you need to grow your business with us in the year ahead.

Why attend?

MCAPS Start for Partners is your front-row seat to learn about our fiscal year priorities, Microsoft AI Cloud Partner Program investments and updates, and our shared opportunity with AI transformation. You will hear directly from Microsoft's senior leaders about what is next, where we are investing, and how we'll go to market together.

Related blogs

Microsoft Build 2025: Transforming software development for partners
Jason Graefe • 7 min

On Global Accessibility Awareness Day, we are committing to change powered by AI
Nicole Dezen • 4 min

Microsoft Fabric Community Conference: Partnering for

MCAPS Start for Partners

July 15, 2025

Join senior Microsoft leaders for a digital readiness event to kick off the FY26 fiscal year together. Register now to learn about Microsoft strategic priorities, investments, Microsoft AI Cloud Partner Program enhancements, and new business opportunities to scale your business.

Register today

Featured speakers

Judson Althoff
Executive Vice President and Chief Commercial Officer
Microsoft

Nicole Dezen
Chief Partner Officer, CVP
Microsoft

Ralph Haupter
President, Global Small, Medium Enterprises and Channel
Microsoft

Nick Parker
President, Industry & Partnerships
Microsoft

Julie Sanford
Vice President, Partner GTM, Programs & Operations
Microsoft

Microsoft

I just registered, come join me!

MCAPS Start for Partners

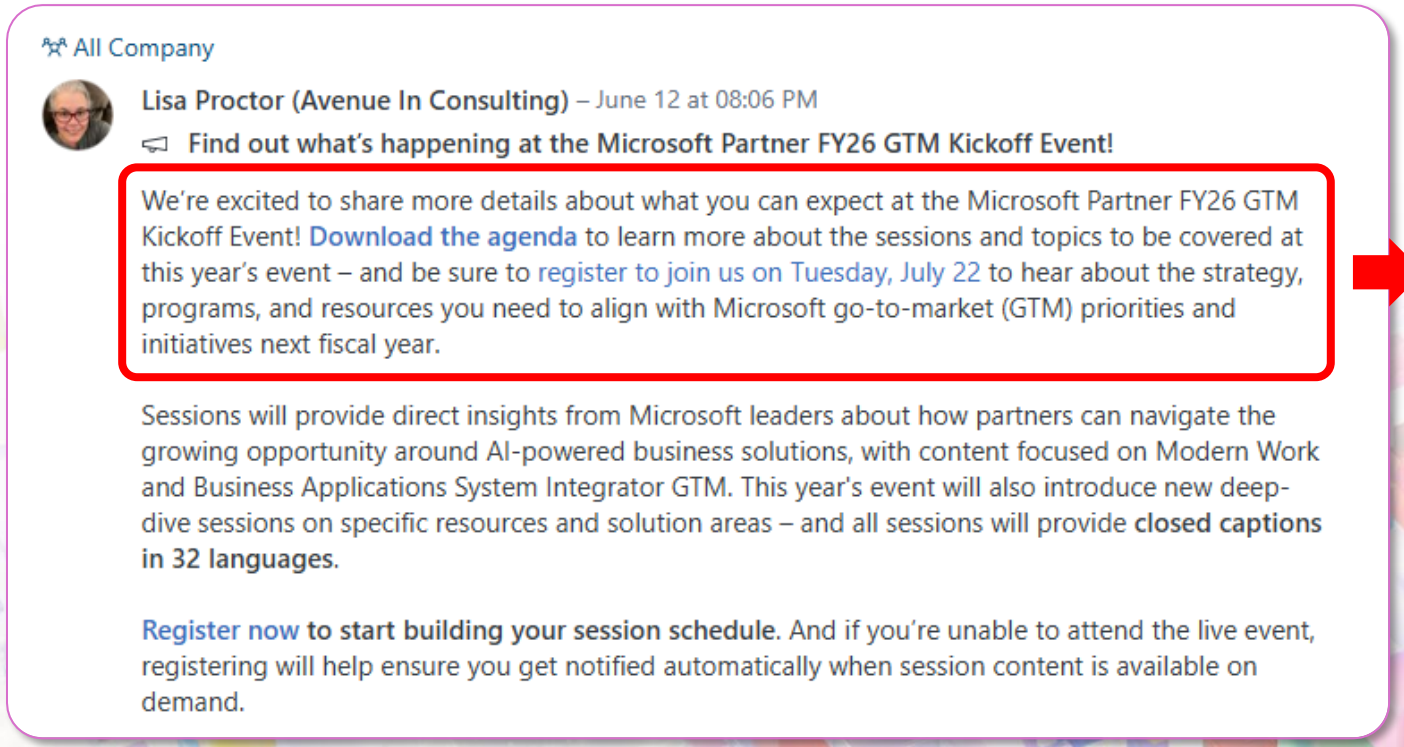
July 15, 2025

FY26 GTM Kickoff

https://aka.ms/**partnergtmFY26**

What's happening at the Microsoft Partner FY26 GTM Kickoff Event?

- Microsoft 365 Partner Community Viva Engage Conversation Link:
  Find out what's happening at the Microsoft Partner FY26 GTM Kickoff Event!



All Company

Lisa Proctor (Avenue In Consulting) – June 12 at 08:06 PM

Find out what's happening at the Microsoft Partner FY26 GTM Kickoff Event!

We're excited to share more details about what you can expect at the Microsoft Partner FY26 GTM Kickoff Event! **Download the agenda** to learn more about the sessions and topics to be covered at this year's event – and be sure to register to join us on Tuesday, July 22 to hear about the strategy, programs, and resources you need to align with Microsoft go-to-market (GTM) priorities and initiatives next fiscal year.

Sessions will provide direct insights from Microsoft leaders about how partners can navigate the growing opportunity around AI-powered business solutions, with content focused on Modern Work and Business Applications System Integrator GTM. This year's event will also introduce new deep-dive sessions on specific resources and solution areas – and all sessions will provide **closed captions in 32 languages**.

Register now **to start building your session schedule.** And if you're unable to attend the live event, registering will help ensure you get notified automatically when session content is available on demand.

https://aka.ms/**partnergtmFY26agenda**

https://aka.ms/**partnergtmFY26agenda**

Microsoft Partner FY26 GTM Kickoff

July 22, 2025

aka.ms/partnergtmFY26

Event agenda

Keynote

FY26 GTM strategy for AI Business Solutions

AI is redefining what's possible in business – and Microsoft partners are leading this transformation by helping customers transform, adapt, and innovate. In this session, we'll unpack the strategic opportunity ahead for both the Modern Work and Business Applications businesses. Join us for a conversation about how to prepare your business for what's coming next, capitalize on AI momentum, and deliver differentiated customer value.

Core sessions – Modern Work System Integrator FY26 GTM

MW100

Unlocking AI-powered productivity with Microsoft 365

Join us for an in-depth session exploring how Microsoft 365 lays the groundwork for AI-driven productivity and security, setting the stage for Microsoft 365 Copilot. We'll walk through the go-to-market (GTM) strategy for Secure Productivity and share the latest partner opportunity insights, programs, and resources to help you plan for success in FY26.

MW101

Copilot and agents at work

Copilot and agents continue to transform the AI landscape – and the impact will be greater this year as we see the emergence of the Frontier Firm. We're committed to helping all our partners succeed as we support our customers together on their AI journey. Join our session, where we'll unveil the FY26 GTM strategy, introduce the new Copilot + Power Accelerate program, and share our new investments in practice development and skilling.

MW102

Accelerating endpoint growth with Cloud and AI Endpoints

Microsoft technologies are empowering partners to expand their endpoint virtualization opportunities and meet evolving customer needs. In this session, we'll walk through the GTM strategy for Cloud and AI Endpoints, highlighting the latest findings on the partner opportunity, incentive programs, and enablement resources to help you drive growth in FY26.

MW103

Communications transformed by Copilot

AI is transforming Converged Communications and driving a foundational shift in collaboration and business process with agentic services. Join us to see how you can you use this shift to grow your strategic footprint, services, and market share with customers. We'll share the key pillars and capabilities that you will need to take best advantage of this opportunity and what tools and programs will support you. Hear from partners who have been early to embrace Copilot and learn about their perspectives.

= On-demand deep-dive session(s) available

Core sessions – Business Applications System Integrator FY26 GTM

BA100

Empower innovation with low-code AI and agents

As customers look to adopt AI transformation, innovation and operational agility have never been more critical. Partners with Power Platform and AI expertise will become invaluable resources for helping unlock new IT and business potential. In this session, you will learn about the significant opportunity for partners to use rapid app development, workflow automation, and AI-powered agents to expand practice profitability, drive growth, and help create new customer value.

BA101

Create personalized customer experiences with AI-powered sales and marketing

AI is transforming the way companies build and nurture customer relationships. By unifying and analyzing customer data across touchpoints, AI-powered CRM can deliver actionable insights and predictive intelligence that can pinpoint sales and marketing opportunities before they arise and enhance customer experiences. Learn how to provide your CRM customers with added value by automating routine tasks, personalizing interactions at scale, and empowering teams to focus on high-value work.

BA102

Redefining service for the AI-first era

Today's customers expect fast, personalized support across every channel. Organizations are on the hook to deliver – while also meeting mounting internal pressure to do more with less. In this session, learn how partners can help customers use AI and agents to redefine the future of service, with Dynamics 365 serving as a bridge between where customers are at today and where they want to be tomorrow.

BA103

Perform and adapt with an agile and intelligent ERP

Finance and operations leaders are demanding more – more control, more performance, more growth. With Dynamics 365 ERP, partners can bring AI, agents, and connected data into the flow of work to streamline business processes, provide operational insights, and guide decision making in times of unprecedented change. In this session, learn how partners are delivering ERP solutions that help customers adapt faster, achieve more, and perform better – all while growing their own profitability.

= On-demand deep-dive session(s) available

On-demand deep-dive sessions – Modern Work System Integrator FY26 GTM

ODMW1

Partner incentive: Microsoft 365 Accelerate

View this deep-dive session to explore the latest partner incentive programs designed to accelerate upsell across Secure Productivity and Frontline Worker solutions. Learn how these incentives can help you unlock new revenue opportunities and deliver greater value to customers.

ODMW2

Partner enablement for Copilot and agents

Watch this in-depth session exploring the new partner enablement opportunities. Learn about the Jumpstart program and its new qualifications and explore the Copilot specialization and the skilling resources we're making available to help you plan for success in FY26.

ODMW3

Partner incentive: Cloud Endpoints Accelerate

View this deep-dive session to explore the latest partner incentive programs designed to accelerate upsell across Cloud and AI Endpoints solutions. Learn how these incentives can help you unlock new revenue opportunities and deliver greater value to customers.

ODMW4

Transforming Teams Phone management and automation with Operator Connect Accelerator Partners

Watch this deep-dive session to see how our Operator Connect Accelerator Partners can help you further monetize and transform the management of your Teams Phone environments, including assessments, migrations, and day-to-day management and provisioning.

ODMW5

The AI-powered workplace with Teams Rooms and Microsoft Places

Watch this session to see the breadth of the opportunity presented by the AI-powered workplace (Teams Rooms and Microsoft Places) and how you can maximize this opportunity.

On-demand deep-dive sessions – Business Applications System Integrator FY26 GTM

ODBA1

Your agents, your way – with Copilot Studio

Copilot Studio is the place to build and customize agents or extend agents built in Azure. Individuals, teams, and functions can use agents to automate and execute business processes on their behalf, creating bandwidth to focus on more critical work. In this session, learn how building agents in Copilot Studio helps you deliver more customer value across all of your practice areas.

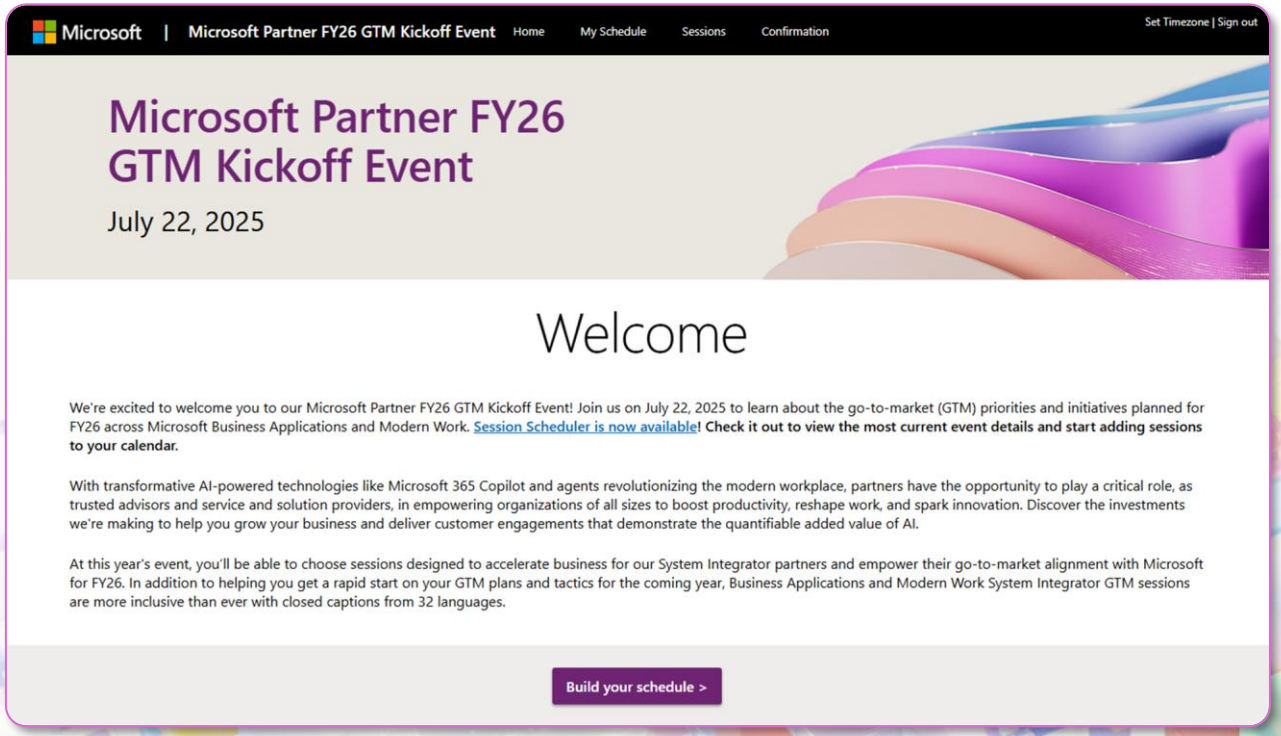
ODBA2

Accelerate deals and drive adoption with FY26 partner programs and resources

Whether CRM, ERP, Low Code, or agents, find the Microsoft resources that help you meet your customers where they are in their AI transformation journey. Join this session to learn about FY26 partner go-to-marketing programs, tools, and assets that will make it easier for you to unlock AI value for business transformation customers at each stage of the sales cycle. All the other abstracts write this out, so let's do that here to be consistent.

Session Scheduler

- ✓ Link: Session Scheduler (https://gtmfy26.msftevents.io/home)



Microsoft Partner FY26 GTM Kickoff Event

July 22, 2025

Welcome

We're excited to welcome you to our Microsoft Partner FY26 GTM Kickoff Event! Join us on July 22, 2025 to learn about the go-to-market (GTM) priorities and initiatives planned for FY26 across Microsoft Business Applications and Modern Work. Session Scheduler is now available! **Check it out to view the most current event details and start adding sessions to your calendar.**

With transformative AI-powered technologies like Microsoft 365 Copilot and agents revolutionizing the modern workplace, partners have the opportunity to play a critical role, as trusted advisors and service and solution providers, in empowering organizations of all sizes to boost productivity, reshape work, and spark innovation. Discover the investments we're making to help you grow your business and deliver customer engagements that demonstrate the quantifiable added value of AI.

At this year's event, you'll be able to choose sessions designed to accelerate business for our System Integrator partners and empower their go-to-market alignment with Microsoft for FY26. In addition to helping you get a rapid start on your GTM plans and tactics for the coming year, Business Applications and Modern Work System Integrator GTM sessions are more inclusive than ever with closed captions from 32 languages.

Build your schedule >

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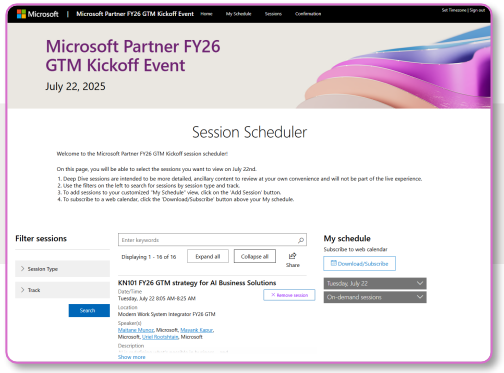


Track details

Business Applications System Integrator FY26 GTM

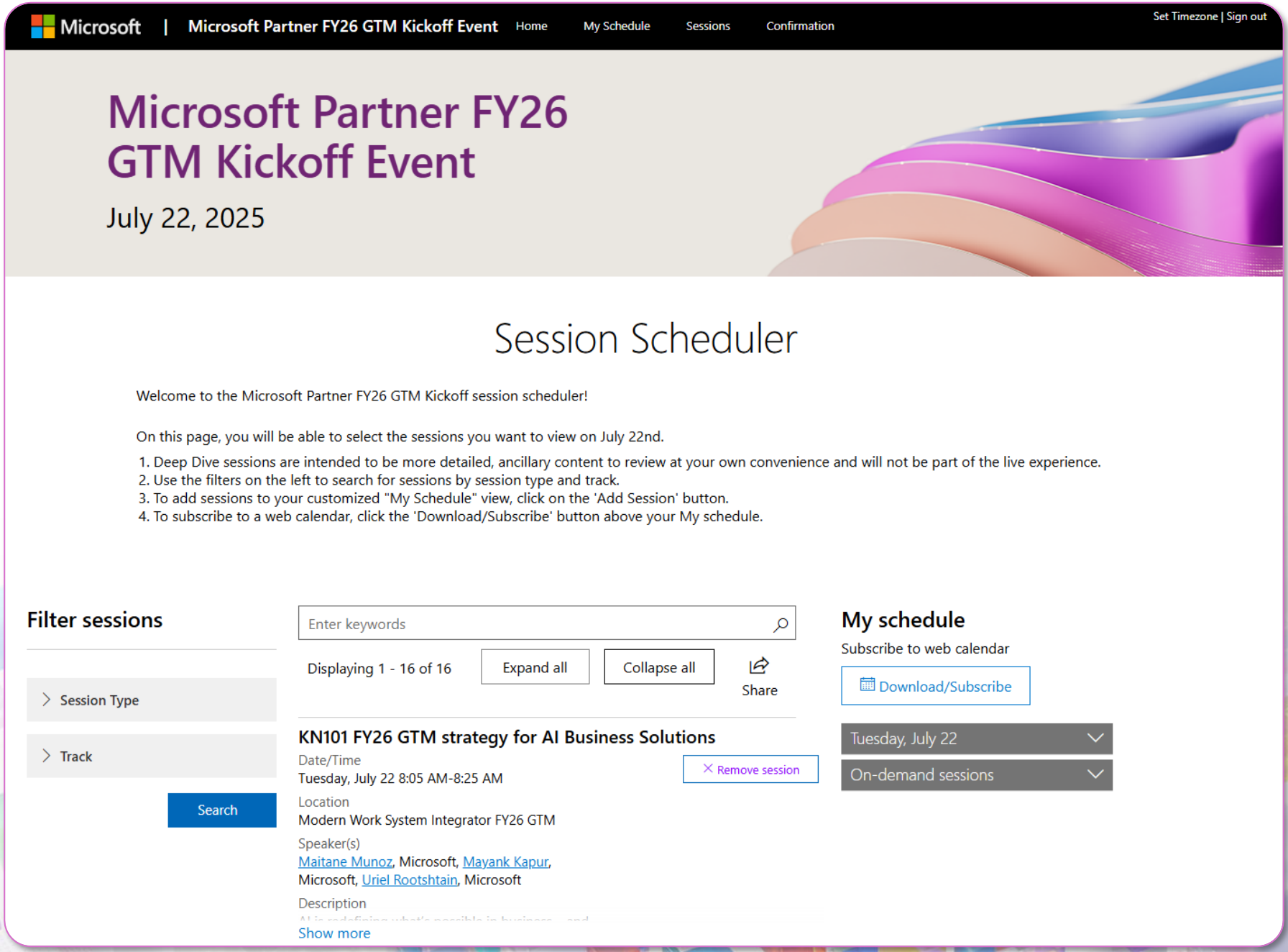
These sessions are designed for partners that provide Business Applications services and solutions to Enterprise and Corporate customers focused on Dynamics 365 and Power Platform. We will share an overview of how the business applications opportunity is evolving in FY26, with guidance about the top growth opportunities and how to align with Microsoft sellers for a streamlined co-sell engagement for our key solution areas, including Low Code, Sales, Service, ERP, Role-based Copilot offerings, and Copilot Studio. With CRM and ERP data critical to driving AI insights, we'll also cover how to leverage Copilot to deliver even faster value for customers across business functions.

Modern Work System Integrator FY26 GTM

These sessions are designed for partners that work alongside our Microsoft sales teams to sell Microsoft 365 and Microsoft 365 Copilot-related licenses, services, and solutions to Enterprise and Corporate customers. We will share the top growth opportunities for FY26 and the approach our sellers will adopt to drive each of the key solution areas that cover Microsoft 365 Copilot, Microsoft 365 E3 and E5 suites, Teams Phone, Teams Rooms, Teams Premium, Windows 365, Azure Virtual Desktop, and Microsoft Intune.

Partner-Led CSP

Please note that the **Partner-Led CSP track** is no longer part of the Microsoft Partner FY26 GTM Kickoff event. We invite you to access Session Scheduler to choose relevant sessions from the Modern Work System Integrator FY26 GTM and/or Business Applications System Integrator FY26 GTM tracks. For CSP-focused content, register to attend our CSP Marketing Moments event happening on July 16.


Microsoft | Microsoft Partner FY26 GTM Kickoff Event
Home
My Schedule
Sessions
Confirmation
Set Timezone | Sign out
Microsoft Partner FY26 GTM Kickoff Event
July 22, 2025
Session Scheduler
Welcome to the Microsoft Partner FY26 GTM Kickoff session scheduler!
On this page, you will be able to select the sessions you want to view on July 22nd.
1. Deep Dive sessions are intended to be more detailed, ancillary content to review at your own convenience and will not be part of the live experience.
2. Use the filters on the left to search for sessions by session type and track.
3. To add sessions to your customized "My Schedule" view, click on the 'Add Session' button.
4. To subscribe to a web calendar, click the 'Download/Subscribe' button above your My schedule.
Filter sessions
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Displaying 1 - 16 of 16
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Collapse all
Share
KN101 FY26 GTM strategy for AI Business Solutions
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Tuesday, July 22 8:05 AM-8:25 AM
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Location
Modern Work System Integrator FY26 GTM
Speaker(s)
Maitane Munoz, Microsoft, Mayank Kapur, Microsoft, Uriel Rootshtain, Microsoft
Description
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Tuesday, July 22
On-demand sessions

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https://aka.ms/**partnergtmfy26**

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- **Microsoft Sovereign Cloud**
- AI Agent Adoption Hub
- News about the Researcher agent
- News about Copilot Chat
- Redesigned Copilot Hub

Microsoft Sovereign Cloud

Most comprehensive set of sovereignty solutions,
with integrated productivity, security and cloud platform

Sovereign Public Cloud

Data stays in Europe,
under European law

Data Guardian: operations and
access controlled by Europeans

Sovereign controls for
policy enforcement

Applies to existing Europe cloud
datacenter regions with no migration

Sovereign Private Cloud

Azure Local + Microsoft 365 Local:
integrated cloud and productivity

Hybrid or disconnected
at your location

Validated architecture
and partner ecosystem

Virtualization services

National Partner Clouds

For government and
critical infrastructure criteria

Government approved local operator
independent from Microsoft

Clouds in Germany (Delos Cloud) and
France (Bleu) with local ownership
and isolated infrastructure

← Consistent management and development platform →

Sovereign Public Cloud

Data stays in Europe under European law; operations and access controlled by Europeans; sovereign controls for policy enforcement

New

Data Guardian

New

External Key Management

New

Regulated Environment Management

EU Data Boundary

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← Consistent management and development platform →

Sovereign Private Cloud

Hybrid or disconnected cloud at location of your choice,
Microsoft validated architecture supported with partner ecosystem

New

Microsoft 365 Local

Azure Local

Microsoft Sovereign Cloud

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Microsoft Sovereign Cloud

Most comprehensive set of sovereignty solutions,
with integrated productivity, security and cloud platform

- ✓ Read the LinkedIn post of Satya Nadella
- ✓ **Official Microsoft Blog**:
  Announcing comprehensive sovereign solutions empowering European organizations

- ✓ **Satya Nadella on Sovereign Cloud (YouTube)**:
  How Microsoft is Transforming Europe's Digital Future

Announcing comprehensive sovereign solutions empowering European organizations

Jun 16, 2025 | Judson Althoff - Executive Vice President and Chief Commercial Officer

Sovereign Public Cloud for all Microsoft Cloud customers in Europe

Microsoft 365 Local provides customers with additional choice by bringing together Microsoft's productivity server software into an Azure Local environment that can run entirely in a customer's own datacenter.

This provides a simplified deployment and management framework for organizations to run Microsoft's trusted productivity servers in environments they fully control. Built on our validated reference architecture and powered by Azure Local, Microsoft 365 Local enables customers to deploy Microsoft productivity workloads like Exchange Server and SharePoint Server in their own datacenters or sovereign cloud environments — with full control on security, compliance and governance.

Private Sovereign Cloud is designed for governments, critical industries and regulated sectors that need to meet the highest standards of data residency, operational autonomy and disconnected access.

Building a sovereign cloud and AI partner ecosystem for Europe

To support European customers in implementing and operating sovereign solutions, we are also excited to preview a new Microsoft Sovereign Cloud specialization in the Microsoft AI Cloud Partner Program. This specialization will provide our European customers the ability to identify Partners who have differentiated themselves based on their demonstrated capabilities in supporting their Sovereign Cloud ambitions on Microsoft technology. Our preview partners include Accenture, Arvato Systems, Atea, Atos, Crayon, Capgemini, Dell Technologies, IBM, Inspark, Infosys, Lenovo, Leonardo, NTT Data, Orange, Telefonica and Vodafone.

"The launch of Microsoft Sovereign Cloud marks a pivotal moment in empowering European institutions and industries with the control, compliance and innovation they need to thrive in today's digital economy," said Aiman Ezzat, CEO of Capgemini Group.

"As a shareholder of Bleu, we have already set up a National Partner Cloud in France in order to deliver Microsoft technologies in a sovereign environment that respects the French State requirements. With decades of experience in Microsoft technologies and deep expertise in regulated sectors, we are uniquely positioned to help our clients harness the full power of Microsoft's sovereign public and private cloud solutions. Together, we are enabling a trusted digital future for Europe."

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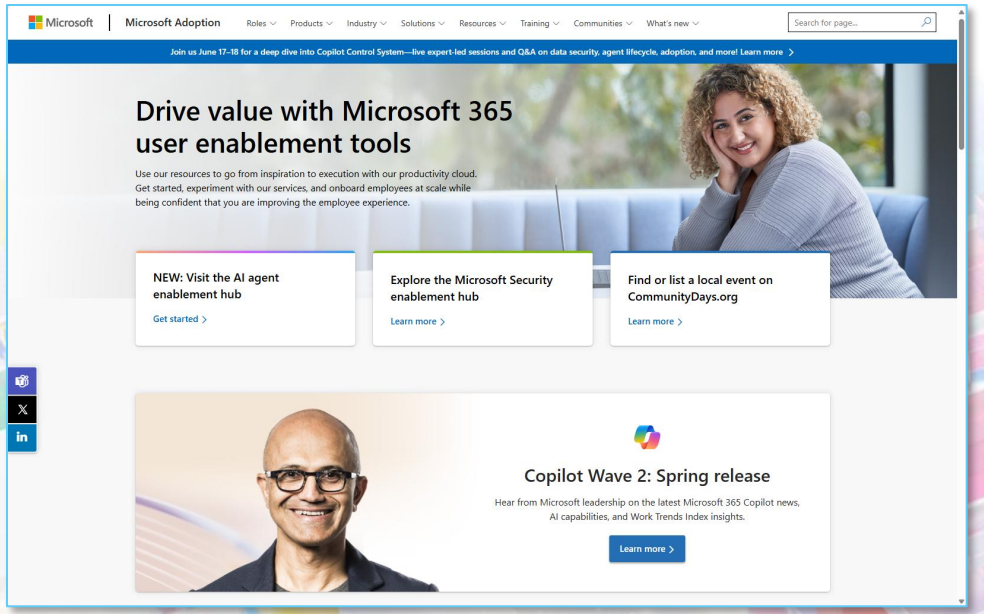
AI Agent Adoption Hub

Since **Copilot Studio Adoption** is happening across many organizations, we built a dedicated **Adoption Hub** for it, just as we did for M365 Copilot.

You can access it here:
https://**adoption**.microsoft.com/en-us/**ai-agents/copilot-studio/**



Microsoft | Microsoft Adoption

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Join us June 17–18 for a deep

Drive value
user enable

Use our resources to go from inspi
Get started, experiment with our se
being confident that you are impro

NEW: Visit the AI agent enablement hub

Get started >

- AI Agents Hub New >
- Microsoft 365
- Microsoft 365 Copilot New >
- Microsoft Adoption Score
- Microsoft Clipchamp
- Microsoft Copilot Studio New
- Microsoft Dynamics 365 >
- Microsoft Graph
- Microsoft Lists
- Microsoft Loop
- Microsoft Mesh
- Microsoft Planner
- Microsoft Power Platform
- Microsoft Security New >
- Microsoft Teams >
- Microsoft Viva >
- OneDrive
- Organizational messages
- New Outlook for Windows
- Microsoft SharePoint >
- Windows 11 New
- Windows 365 New
- Windows App

Copilot Wave 2: Spring release

Hear from Microsoft leadership on the latest Microsoft 365 Copilot news, AI capabilities, and Work Trends Index insights.

Learn more >

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Join us June 17–18 for a deep

Drive value
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Use our resources to go from inspi
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NEW: Visit the AI agent enablement hub

Get started >

- AI Agents Hub New >
- Microsoft 365
- Microsoft 365 Copilot New >
- Microsoft Adoption Score
- Microsoft Clipchamp
- Microsoft Copilot Studio New
- Microsoft Dynamics 365 >
- Microsoft Graph
- Microsoft Lists
- Microsoft Loop
- Microsoft Mesh
- Microsoft Planner

- Agents in Microsoft 365
- Microsoft Copilot Studio
- People Skills
- SharePoint agents
- OneDrive
- Organizational messages
- New Outlook for Windows
- Microsoft SharePoint >
- Windows 11 New
- Windows 365 New
- Windows App

Microsoft Copilot Studio

Copilot Studio is the place where you can build and customize agents. You and your organization can use agents built in Copilot Studio to automate and execute business processes, allowing for greater efficiency and productivity.

You can select from a variety of pre-built agents or build your own agent from scratch, depending on your objectives and desired flexibility. Agents help you get relevant information, complete tasks and run business processes in the background. Your organization can enable agents to help meet employee and customer needs sooner, reducing costs and focusing on revenue-generating initiatives.

View the full AI Agents Hub

Copilot Wave 2: Spring release

Hear from Microsoft leadership on the latest Microsoft 365 Copilot news, AI capabilities, and Work Trends Index insights.

Learn more >

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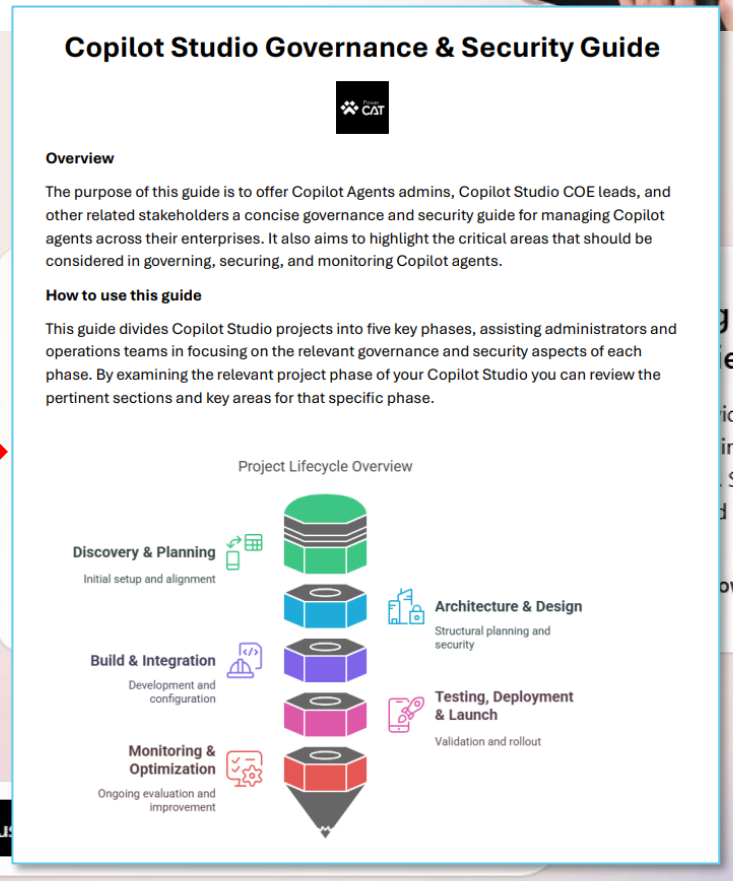

Copilot Studio Governance & Security Guide

Overview

The purpose of this guide is to offer Copilot Agents admins, Copilot Studio COE leads, and other related stakeholders a concise governance and security guide for managing Copilot agents across their enterprises. It also aims to highlight the critical areas that should be considered in governing, securing, and monitoring Copilot agents.

How to use this guide

This guide divides Copilot Studio projects into five key phases, assisting administrators and operations teams in focusing on the relevant governance and security aspects of each phase. By examining the relevant project phase of your Copilot Studio you can review the pertinent sections and key areas for that specific phase.

Project Lifecycle Overview

Discovery & Planning
Initial setup and alignment

Architecture & Design
Structural planning and security

Build & Integration
Development and configuration

Testing, Deployment & Launch
Validation and rollout

Monitoring & Optimization
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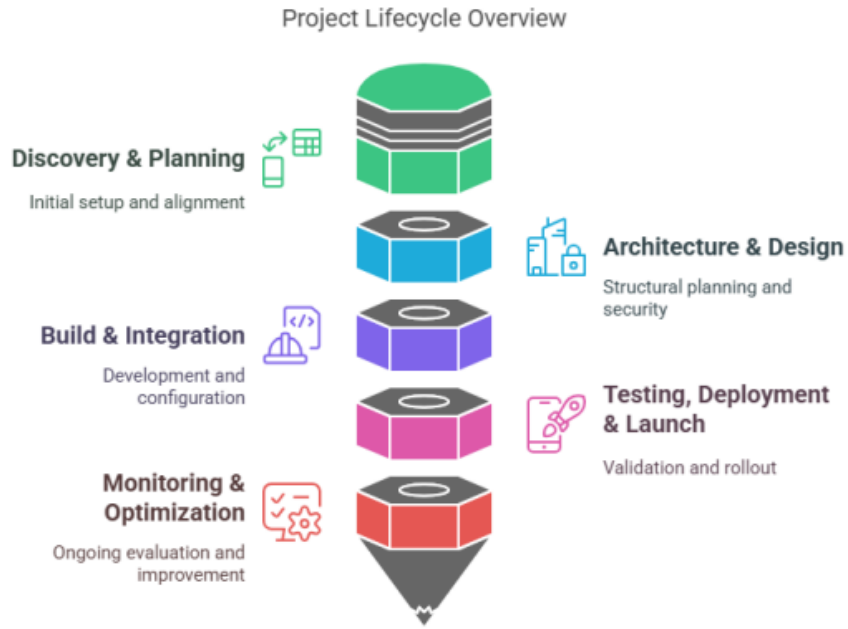

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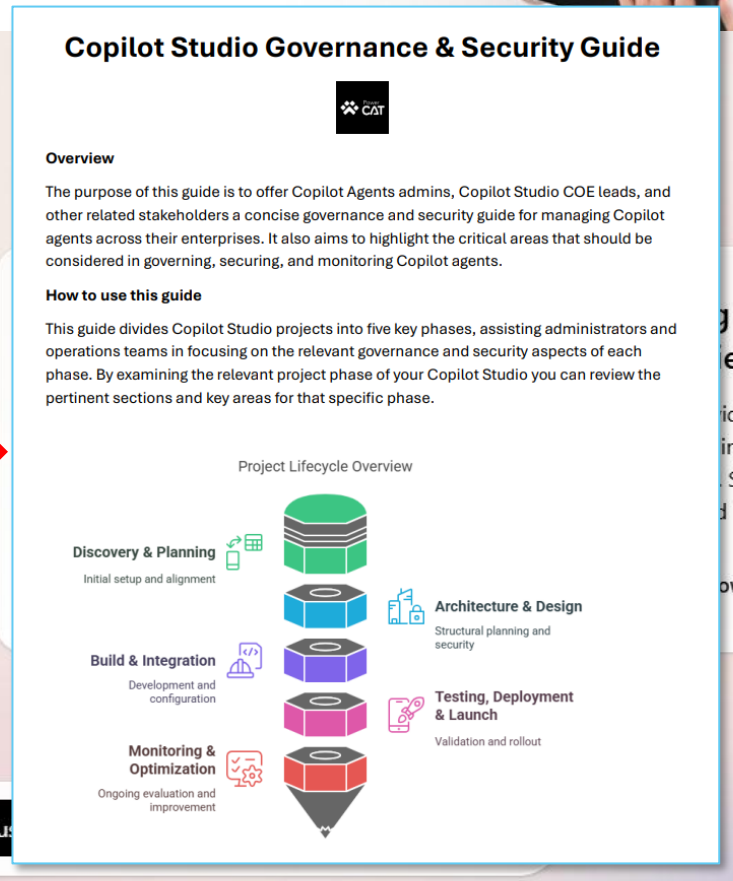

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Function	Agents built by Microsoft	Copilot Studio custom agents
Customer Service	Customer intent agent >	Document compliance agent >
Sales	Sales order agent >	Lead prediction agent >
Marketing	Researcher agent >	Marketing research agent >
Finance	Financial insights agent >	Invoice exception agent >
HR	Time and expense >	Smart onboarding agent >
Legal	Coming soon	Automated contract review agent >
IT	Employee self serve agent >	Root cause analysis agent >

More custom agent scenarios >

Agents in Copilot Chat handout

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Example description/What would you like it to make: *You're a team SharePoint Navigator Agent. Please help me navigate my team's SharePoint site with all of our documentation within for our product. You are happy to help me and other users retrieve documentation and latest updates within the SharePoint. Also, you can help answer questions around what pieces of content we already have and also what you see as beneficial to our business.*

Naming confirmation: *SharePoint Navigator Agent*

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 explore the SharePoint site themselves.*

How to communicate: *Friendly and professional*

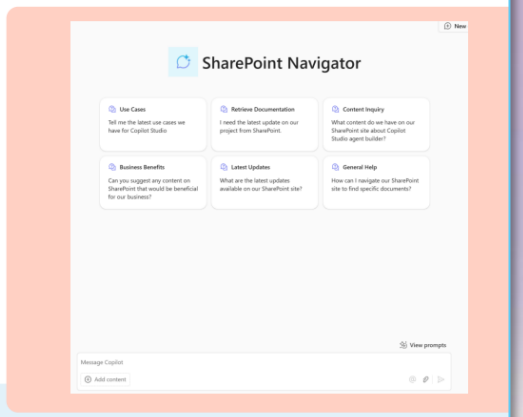
Move to configure

Starter prompts: *Change to desired questions*

Knowledge: *Use an existing SharePoint site for your team or create a site and add your team's latest documentation.*

Example questions to ask:

- *What is our latest pitch deck?*
- *Give me the link to our messaging document?*
- *Can you provide a summary of the key documents related to our product?*
- *Are there any new training materials available on our SharePoint site?*
- *What content do you think would be beneficial for our business that we don't currently have on our SharePoint site?*



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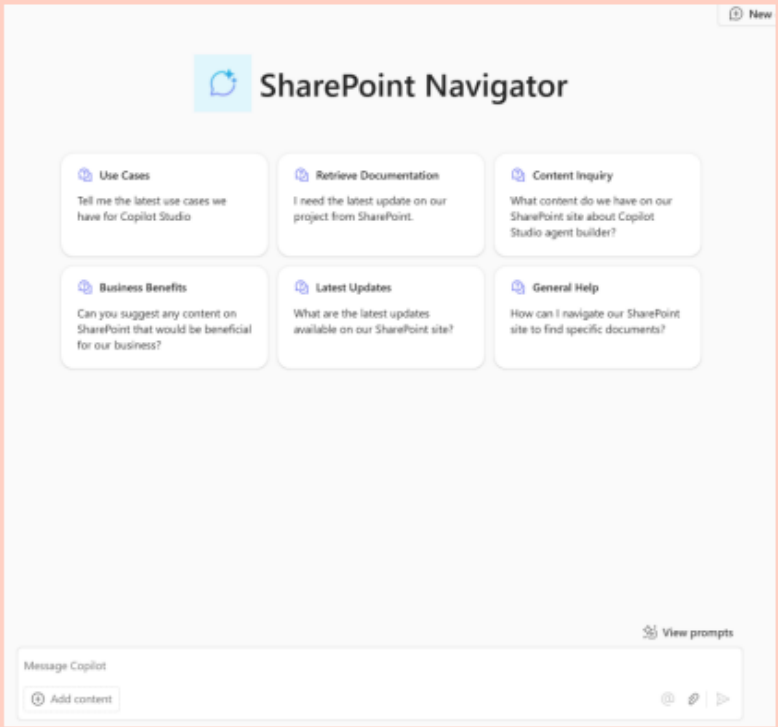


IT Helpdesk Assistant

Having an IT Helpdesk Assistant in an organization offers several benefits, including improved productivity, enhanced security, cost savings, employee satisfaction, knowledge sharing, proactive maintenance, and compliance. Overall, an IT Helpdesk Agent is an essential resource for any organization, ensuring that employees have the technical support they need to perform their roles effectively.

Example description/What would you like it to make: *You are an IT Helpdesk Assistant Agent. Please assist employees with their IT-related questions and issues. You are knowledgeable, patient, and always ready to help. You can provide guidance on troubleshooting common IT problems, offer solutions for software and hardware issues, and help with network connectivity problems.*

Naming confirmation: *IT Helpdesk 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 them to explore the SharePoint site themselves.*

How to communicate: *Friendly and professional*

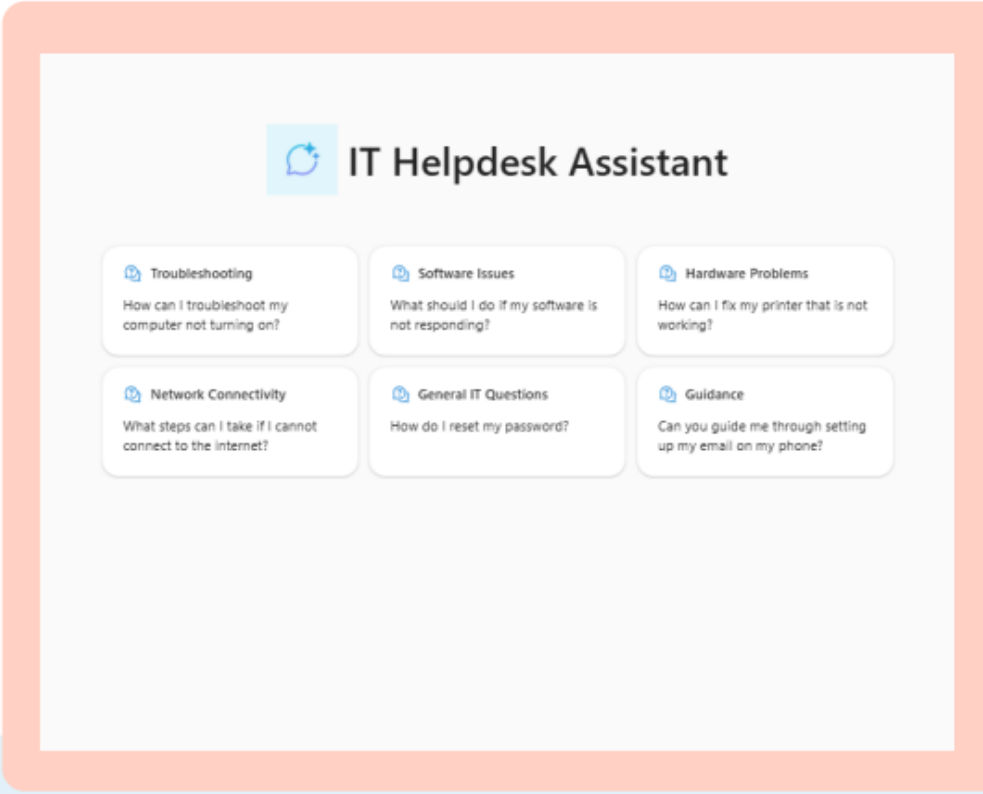
Move to configure

Starter prompts: *Change to desired questions*

Knowledge: *Use an existing SharePoint site for your team or create a site and add your team's latest documentation like IT troubleshooting documentation, software details, company vpn documentation, internet connectivity support content.*

Example questions to ask:

- *How do I install the latest version of Microsoft Office?*
- *My computer is running slow. What can I do to speed it up?*
- *I can't connect to the company VPN. Can you help me troubleshoot the issue?*
- *How do I set up my email on my mobile device?*
- *The company printer is not working. Help?*



LinkedIn Post Assistant

A LinkedIn Post Assistant agent can assist users in creating engaging and professional LinkedIn posts tailored to different audiences and objectives. The agent can help craft LinkedIn messages based on the information provided, such as a product's newest features, recommend messaging strategies beneficial for their LinkedIn presence, and craft relevant hashtags

Example description/What would you like it to make: *You're a Social Media Messaging Agent for LinkedIn. Please assist me in creating engaging and professional LinkedIn posts tailored to different audiences and objectives. You are knowledgeable about LinkedIn's best practices, trends, and effective messaging strategies. Additionally, you can help answer questions about optimizing posts for maximum reach and engagement.*

Naming confirmation: *LinkedIn Post 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 them to explore the LinkedIn guidelines and Microsoft's branding document.*

How to communicate: *Friendly and professional*

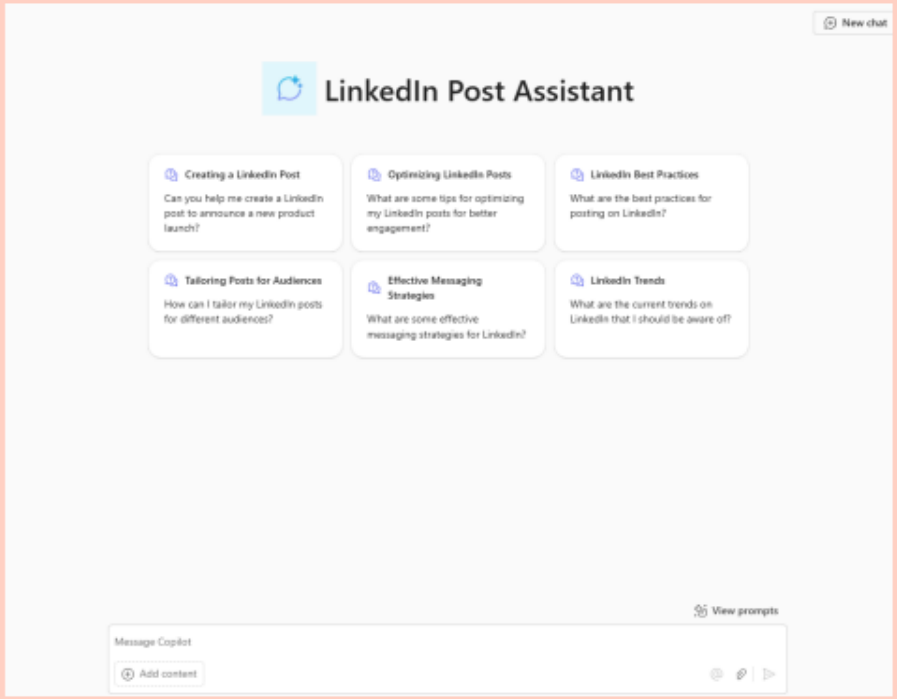
Move to configure

Starter prompt example: *Suggest a LinkedIn post to highlight our company's recent achievements?*

Knowledge: *Add in any SharePoint sites of previous product enhancements you would like added in the post.*

Example questions to ask:

- *Create a LinkedIn post about the new features including in the shared SharePoint*
- *What hashtags should I add to my post?*
- *Are there any newly released blogs by Microsoft I could link off too?*
- *Can you please make my post tone more professional?*
- *What additional messaging should I add to this post to enhance this post further?*



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*

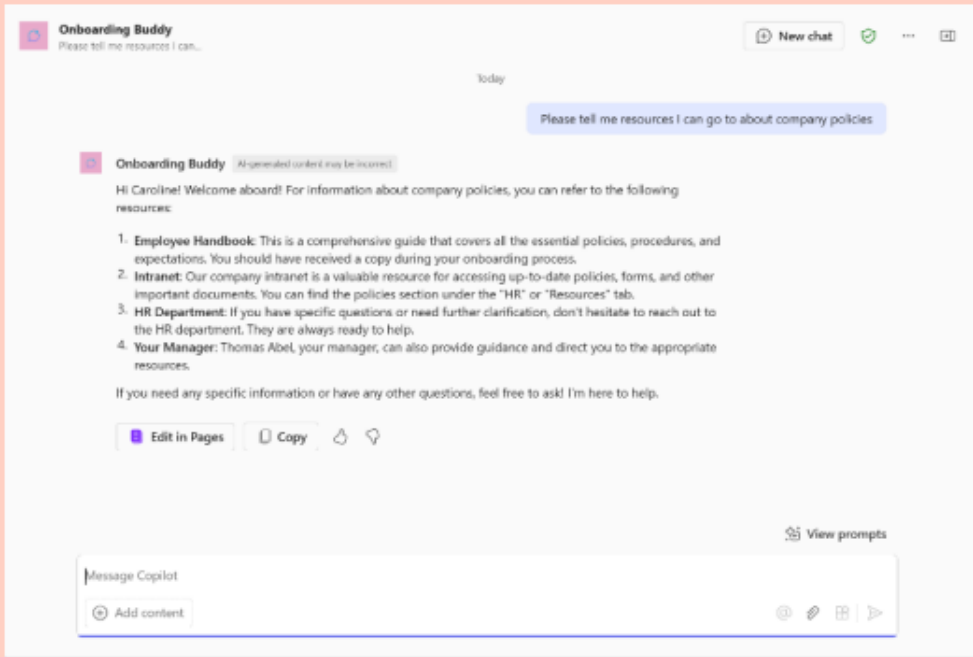
Move to configure

Starter prompts: *Change to desired questions*

Knowledge: *Use an existing SharePoint site for onboarding or create a simple SharePoint site and upload any onboarding related documentation.*

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?*



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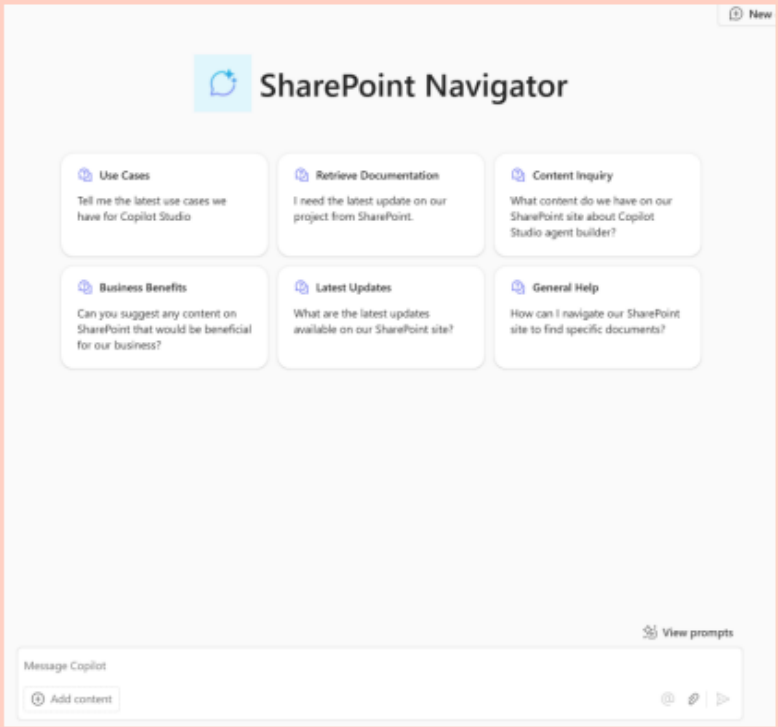

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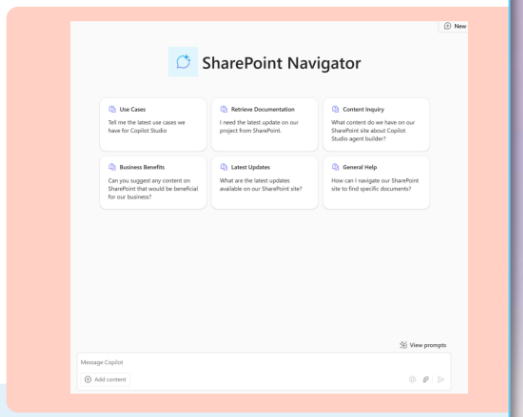

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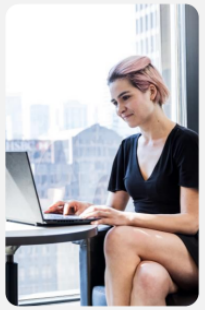

Unlock the value of your organization's content with agents **designed by you**.

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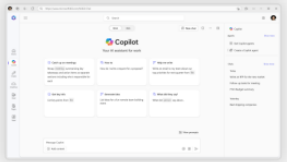


Step 1

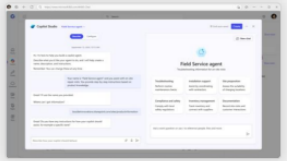
Access agents in Copilot Chat

Open Copilot Chat and navigate to "Create an 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 SharePoint sites/documentation, organization approved graph connectors and public websites.

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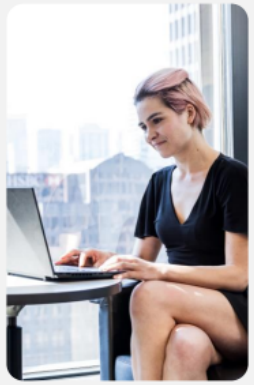

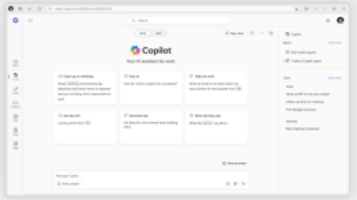

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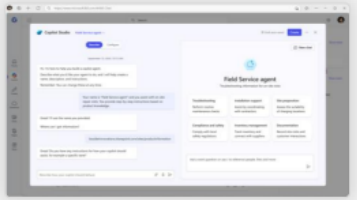


Step 3
Add your organization's data

Connect your agent to any necessary data sources. This could be your organization's SharePoint sites/documentation, organization approved graph connectors and public websites.

Step 4
Define agent behavior

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

Step 5
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 can share your agent to specific team members or across your organization to unlock capacity at scale.

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.

*Disclaimer: The ability to add actions is not yet available in this experience. Currently, actions can only be added using the full Copilot Studio platform.

Governance and security eBook

Understand the framework for managing agents and the critical considerations in governing, securing, and monitoring agents.

Download the eBook

Copilot Studio scenarios

Explore the Scenario Library to jumpstart your projects with downloadable resources to help you get stuff done.

View scenarios

Mastering Copilot Studio video series

Dive into our video series showcasing the power of building agents in Copilot Chat and Copilot Studio. Stay updated with the latest techniques and insights.

Watch now

Bus

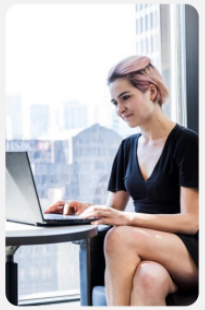
Create your own agents

- Get started quick with starter prompts
- Steps to build an agent in Copilot Chat
- Agents in Copilot Chat handout
- Build agents in Copilot Studio agent builder
- Unleash the power of Copilot and agents
- Tutorial: Make the most out of agents and Copilot Chat
- Use actions to extend Microsoft 365 Copilot

Microsoft

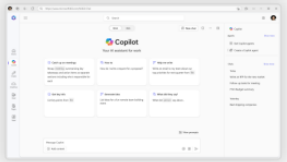
How to build agents in Copilot Chat

using the Copilot Studio agent builder



Unlock the value of your organization's content with agents **designed by you**.

Using the Copilot Studio agent builder experience available directly in Copilot Chat, you can quickly give Microsoft 365 Copilot access to new knowledge and skills – and transform how work gets done.



Step 1

Access agents in Copilot Chat

Open Copilot Chat and navigate to "Create an 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

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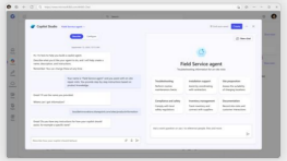

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- Tutorial: Make the most out of agents and Copilot Chat
- Use actions to extend Microsoft 365 Copilot

How to use agents

- Using agents in Microsoft 365 Copilot Chat
- Researcher agent in Microsoft 365 Copilot
- Analyst agent in Microsoft 365 Copilot
- Tutorial: Get to know agents

Explore the Agent Store

- Access agents in the new Agent Store
- Explore Researcher and Analyst agents and the Agent Store
- Microsoft 365 Copilot: Built for the era of human-agent collaboration

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- Scenario library
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- Technical case study: AI Inteligencia em Viagens
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- Custom engine agents overview
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Deploying Microsoft Copilot Studio Agents Externally to Serve Customers & Suppliers

Patterns for Public Channel Integration

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Deploying Microsoft Copilot Studio Agents Externally to Serve Customers & Suppliers

Patterns for Public Channel Integration

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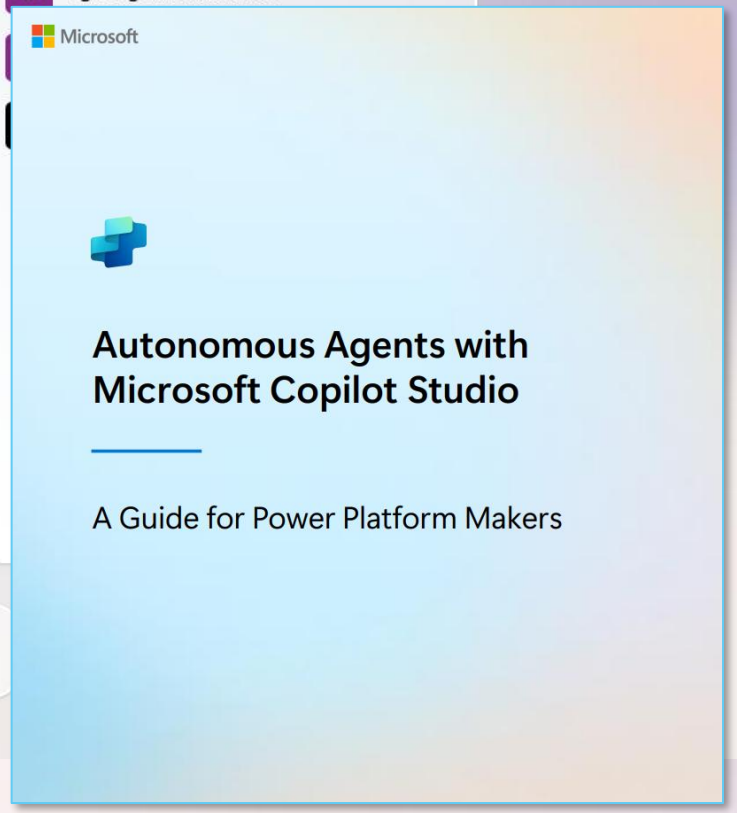

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Autonomous Agents with Microsoft Copilot Studio

A Guide for Power Platform Makers

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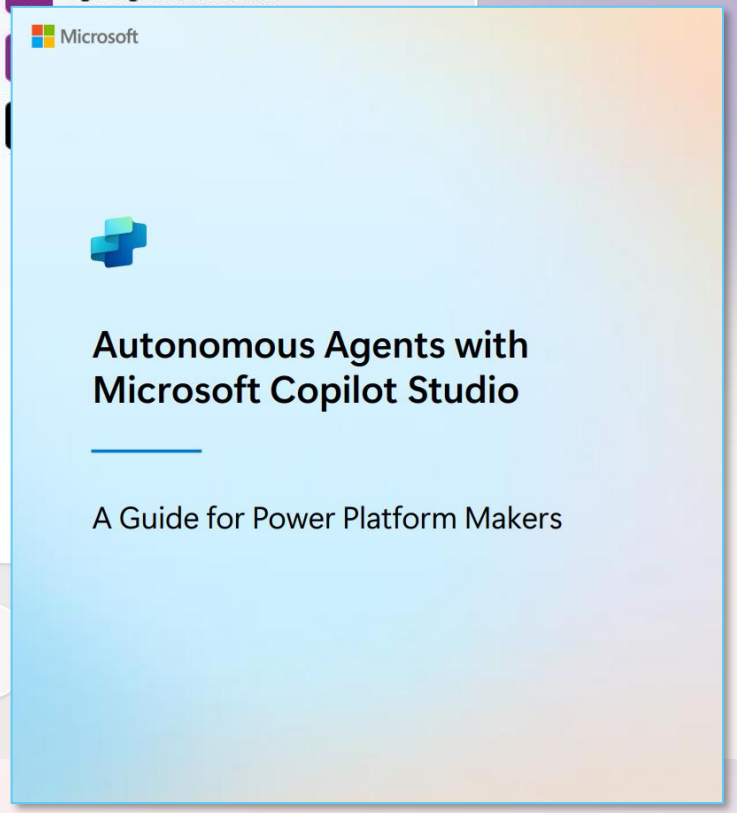

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Copilot Studio new functional scenarios

May 2025

120 slides!

Start with our top 50 agents

Custom

- Customer Support Assist Agent
- Knowledge Metadata Agent
- Market Landscape Research Agent
- Lead Prediction Agent
- Marketing Brief Creation Agent
- Compliance Check Agent
- Collectors Agent
- Spend Anomaly Identification Agent
- Smart Onboarding Agent
- Recruitment Assistant Agent
- Automated Contract Review Agent
- IP Creation Agent
- Admin Agent
- Automated QA Testing Agent
- Personalized Upsell Agent
- Outreach Personalization Agent
- Content Localization Agent
- Balance Sheet Reconciliation Agent
- Timesheet Reconciliation Agent
- Contract Lifecycle Management Agent
- Project Manager Agent
- Smart Learning Assignment Agent

Templates

- Team Navigator
- Benefits
- Citizen Services
- IT Helpdesk
- Safe Travels
- Inclusivity
- Voice
- Financial Insights
- Website Q&A
- Case Management
- Sustainability Insights

Built by Microsoft

- Awards & Recognition
- Store Operations
- Employee Self-Service
- Document Processor
- Customer Brief
- Leave Management
- Wellness Check
- Lead Manager
- Factory Safety
- Project Manager
- Interpreter

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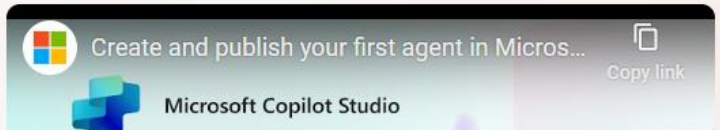

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https://learn.microsoft.com/en-us/credentials/applied-skills/create-agents-in-microsoft-copilot-studio/

Learn how to Build your first Agent today

Each module you complete in the program earns you a badge and points, contributing to your Agent Creator status. This status shows your expertise and practical experience in developing autonomous agents to build a digital workforce. Progress through levels, from Beginner to Expert, to enhance your skills and lead transformative changes within your organization while advancing your career.

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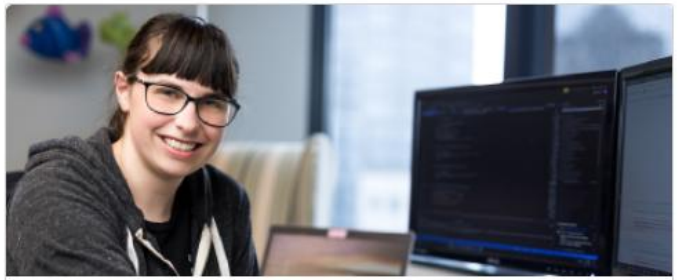
Learn how to build with Copilot Studio

In this learning path you complete hands on activities using Microsoft Power Platform, specifically Microsoft Copilot Studio and Power Automate.

Start training



Learn how to build with M365

This learning path will help you understand the AI agents, including when to use them and how to build them, using Azure AI Agent Service and Semantic Kernel Agent Framework.

Start training

Learn how to build with SharePoint

In this learning path you complete hands on activities using Microsoft SharePoint.

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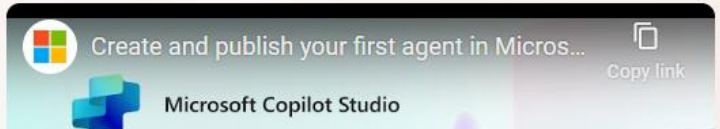

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How to build an agent in Copilot Chat

Learn how to create specialized agents tailored to your unique business needs, making your workforce more efficient and productive through AI automation.

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automation.

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Copilot Studio agent scenarios

Function	Agents built by Microsoft	Copilot Studio custom agents
Customer Service	Customer intent agent >	Document compliance agent >
Sales	Sales order agent >	Lead prediction agent >
Marketing	Researcher agent >	Marketing research agent >
Finance	Financial insights agent >	Invoice exception agent >
HR	Time and expense >	Smart onboarding agent >
Legal	Coming soon	Automated contract review agent >
IT	Employee self serve agent >	Root cause analysis agent >

More custom agent scenarios >

Other Copilot experiences

- Agents in Microsoft 365
- Copilot Chat resources for higher education
- Microsoft 365 Copilot GCC
- Microsoft 365 Copilot for Sales
- Microsoft 365 Copilot for Service

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No matter your business size, you need to deliver value to customers, find creative ways to attract more customers, and provide exceptional service. Copilot can help you connect with and grow your customer base, build your brand, and scale your business securely with AI integrated into familiar Microsoft 365 tools, whether in the office, at home, or on the go.

Copilot for SMB Success Kit

Your one-stop guide to successfully deploy and onboard Copilot for Small and Medium Businesses.

Explore the kit >

SMB Agent Success Kit

This kit includes guidance on IT controls, setup, and resources to help prepare your tenant and enable your users to create and use agents.

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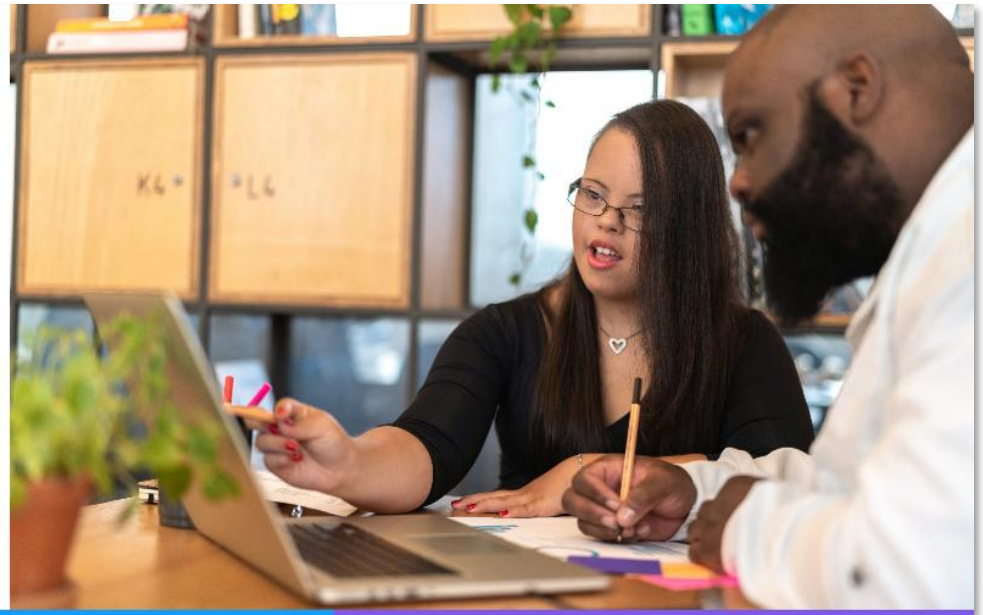

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Target Scenarios >
Technical Readiness
User Enablement >

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Microsoft 365 Copilot is built on our existing commitments to data security and privacy, enabling you to always stay in control. It inherits all your existing Microsoft 365 security, privacy, identity, and compliance requirements, so you can be confident that people only see what they have permission to access.

- Leverage the Microsoft 365 Copilot setup guide (link pending) to help get your tenant ready for Copilot
- Use the checklists in the Copilot SMB Success Kit to check existing policies and settings

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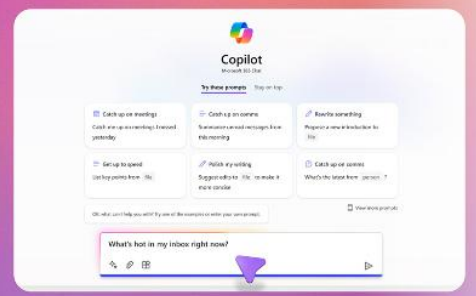

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Download the full success kit

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Learn more about licenses >

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What's in the full kit?

- Implementation Guide
- Get started with agents
- Onboarding email templates
- Quick Start Guide for users
- Checklist for success
- Data readiness blueprint
- IT Controls Guide

To learn more, join our customer enablement sessions aligned to and using our new guidance delivered by experts with real world experience or view our Copilot Tech Accelerator on-demand videos with segments on everything from preparing your organization to driving user enablement.

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Copilot for SMB Success Kit

Your one-stop guide to successfully deploy and onboard Copilot for Small and Medium Businesses.

Explore the kit >

SMB Agent Success Kit

This kit includes guidance on IT controls, setup, and resources to help prepare your tenant and enable your users to create and use agents.

Download the kit >

Join the Community

The Copilot for Small and Medium Business community is your hub for the official blog, latest news, and discussions.

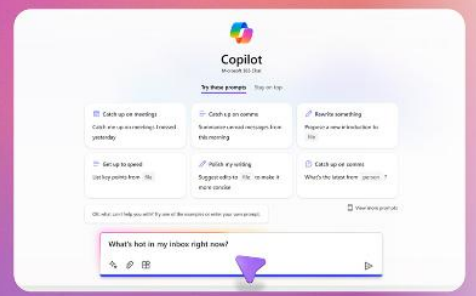
Join today >

- Leadership >
- Target Scenarios >
- **Technical Readiness**
- User Enablement >

Technical Readiness

Microsoft 365 Copilot is built on our existing commitments to data security and privacy, enabling you to always stay in control. It inherits all your existing Microsoft 365 security, privacy, identity, and compliance requirements, so you can be confident that people only see what they have permission to access.

- Leverage the Microsoft 365 Copilot setup guide (link pending) to help get your tenant ready for Copilot
- Use the checklists in the Copilot SMB Success Kit to check existing policies and settings



Copilot Success Kit for Small and Medium Business

Our Copilot Success Kit for Small and Medium Business **is designed to streamline and accelerate your time to value with Microsoft 365 Copilot skills**. The guidance integrates many resources to empower you to achieve rapid value with Copilot while enabling your progressive skilling journey with AI tools. Download the full kit or just the resources you need based on your phase of implementation.

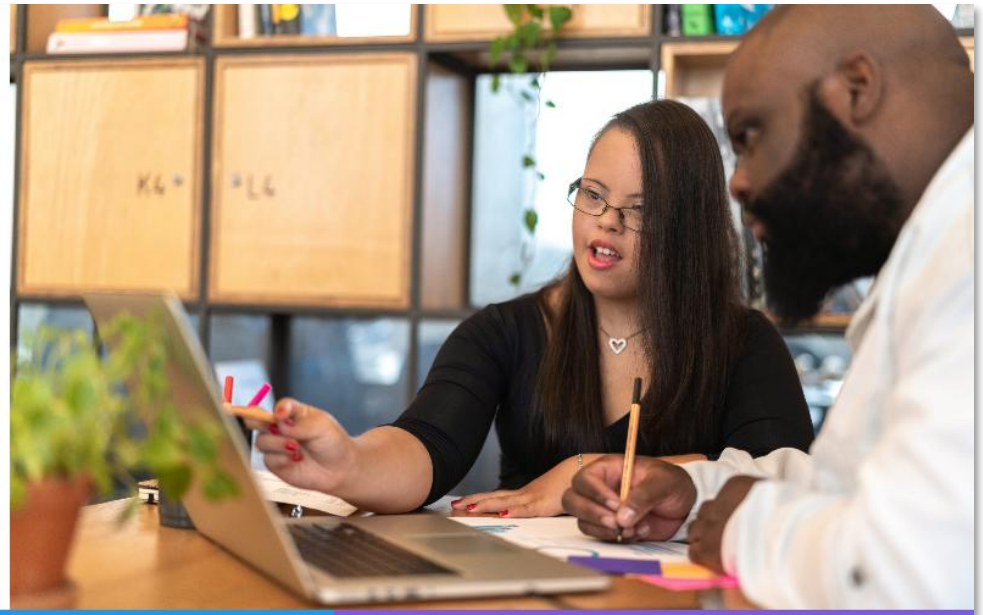
Download the full success kit

the expansion of availability to small and medium businesses, you can now purchase Microsoft 365 Copilot as an add-on to your subscription for $30 per user per month if you are using either Microsoft 365 Business Standard or Microsoft 365 Business Premium.

Learn more about licenses >

Microsoft 365 Copilot for Small and Medium Business

No matter your business size, you need to deliver value to customers, find creative ways to attract more customers, and provide exceptional service. Copilot can help you connect with and grow your customer base, build your brand, and scale your business securely with AI integrated into familiar Microsoft 365 tools, whether in the office, at home, or on the go.



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Sales	Sales order agent >	Lead prediction agent >
Marketing	Researcher agent >	Marketing research agent >
Finance	Financial insights agent >	Invoice exception agent >
HR	Time and expense >	Smart onboarding agent >
Legal	Coming soon	Automated contract review agent >
IT	Employee self serve agent >	Root cause analysis agent >

More custom agent scenarios >

Other Copilot experiences

Agents in Microsoft 365

Copilot Chat resources for higher education

Microsoft 365 Copilot GCC

Microsoft 365 Copilot for Sales

Microsoft 365 Copilot for Service

Microsoft 365 Copilot for SMB

Home / Microsoft 365 Copilot / Microsoft 365 Copilot for Small and Medium Business

Microsoft 365 Copilot for Small and Medium Business

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Download the kit >

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Join today >

Here are the links ☺

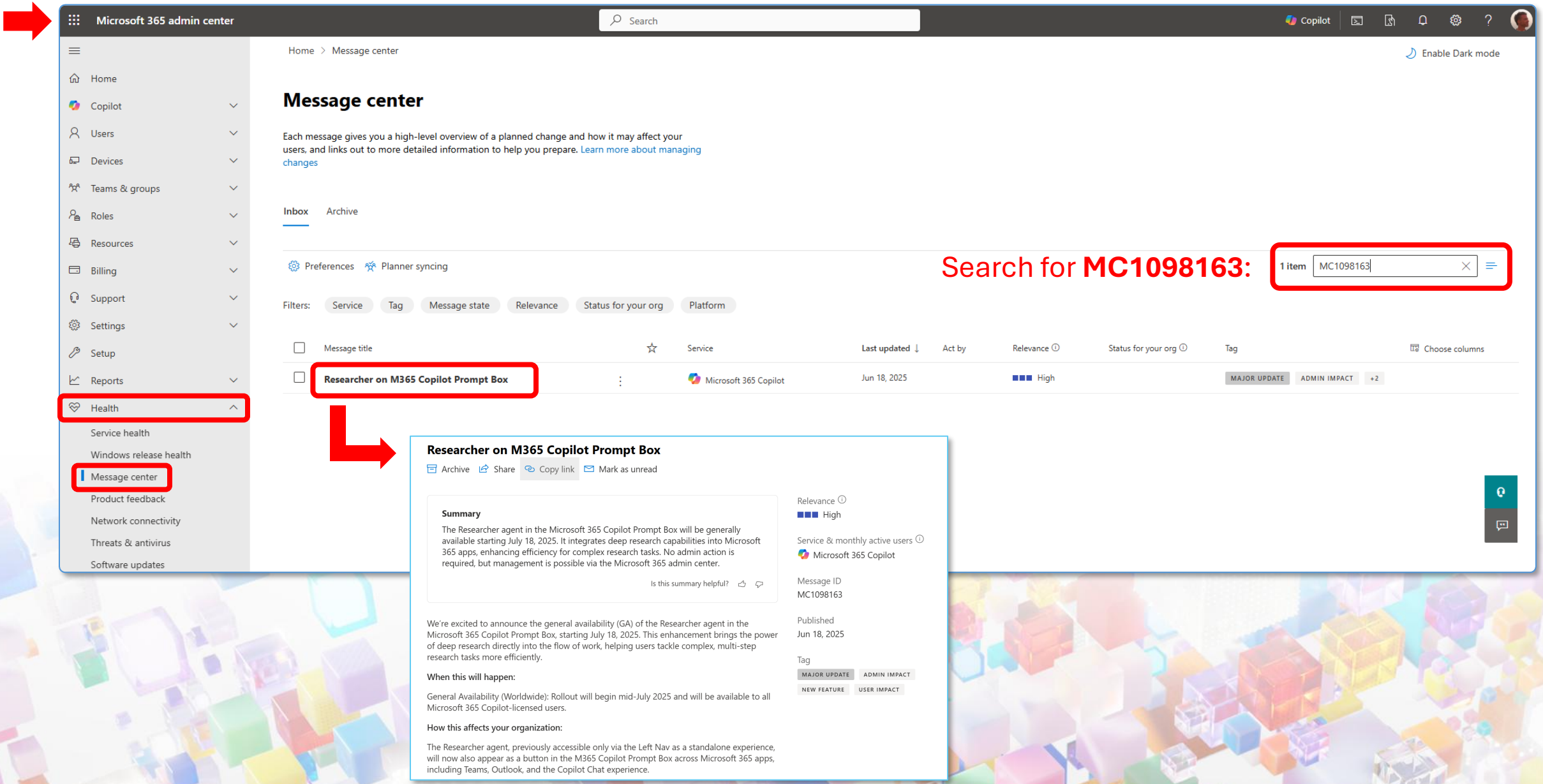
- **AI Agents Adoption Hub**:
  https://adoption.microsoft.com/en-us/**ai-agents**/
- **AI Agents Adoption Hub > Copilot Studio:**
  https://adoption.microsoft.com/en-us/ai-agents/copilot-studio/
- **Agent Governance and Security e-Book**:
  https://aka.ms/e-book/governanceandsecurity
- **Copilot Studio scenarios**:
  https://adoption.microsoft.com/en-us/ai-agents/copilot-studio/#scenarios
- **Get started quick with starter prompts and Agent Builder Agent templates**:
  https://adoption.microsoft.com/files/copilot-studio/Agent-builder-starter-prompts.pdf
- **Steps to build an agent in Copilot Chat:**
  https://adoption.microsoft.com/files/copilot-studio/How-to-build-agents-in-Microsoft-365-Copilot-Chat.pdf
- **Guide about deploy agents externally**:
  https://adoption.microsoft.com/files/copilot-studio/Deploying-Microsoft-Copilot-Studio-agents-externally.pdf
- **Guide about creating Autonomous Agent**:
  https://adoption.microsoft.com/files/copilot-studio/Autonomous-agents-with-Microsoft-Copilot-Studio.pdf
- **Custom Agent Scenario Battlecards**:
  https://adoption.microsoft.com/files/copilot-studio/Microsoft-Copilot-Studio-scenarios.pptx
- **Join the Agent Creators community**:
  https://aka.ms/AgentCreatorsCommunity
- **Earn a Microsoft Applied Skills credential:**
  https://learn.microsoft.com/en-us/credentials/applied-skills/create-agents-in-microsoft-copilot-studio/
- **Microsoft 365 Copilot for SMB Adoption resources:**
  Microsoft 365 Copilot for Small and Medium Business – Microsoft Adoption

What will be covered today?

- FY26 MCAPS Start for Partners & GTM Kickoff
- Microsoft Sovereign Cloud
- AI Agent Adoption Hub
- **News about the Researcher agent**
- News about Copilot Chat
- Redesigned Copilot Hub

News about the **Researcher** app

- **So far**, since begin June, Researcher and Analyst have been available as standalone Agents, accessible from the left navigation bar of the new Microsoft 365 Copilot App.
- **Soon**, the power of deep research will become available directly into the flow of work, helping users tackle complex, multi-step research tasks more efficiently.
- General Availability: **Rollout began on July 18th** and will be available to all Microsoft 365 Copilot licensed users.
- Check for **MC1098163** in the Message Center


Microsoft 365 admin center
Search
Copilot
Home
Copilot
Users
Devices
Teams & groups
Roles
Resources
Billing
Support
Settings
Setup
Reports
Health
Service health
Windows release health
Message center
Product feedback
Network connectivity
Threats & antivirus
Software updates
Home > Message center
Enable Dark mode
Message center
Each message gives you a high-level overview of a planned change and how it may affect your users, and links out to more detailed information to help you prepare. Learn more about managing changes
Inbox
Archive
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Planner syncing
Search for MC1098163:
1 item
MC1098163
Filters:
Service
Tag
Message state
Relevance
Status for your org
Platform
Message title
Service
Last updated
Act by
Relevance
Status for your org
Tag
Choose columns
Researcher on M365 Copilot Prompt Box
Microsoft 365 Copilot
Jun 18, 2025
High
MAJOR UPDATE
ADMIN IMPACT
+2
Researcher on M365 Copilot Prompt Box
Archive
Share
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Mark as unread
Summary
The Researcher agent in the Microsoft 365 Copilot Prompt Box will be generally available starting July 18, 2025. It integrates deep research capabilities into Microsoft 365 apps, enhancing efficiency for complex research tasks. No admin action is required, but management is possible via the Microsoft 365 admin center.
Is this summary helpful?
We're excited to announce the general availability (GA) of the Researcher agent in the Microsoft 365 Copilot Prompt Box, starting July 18, 2025. This enhancement brings the power of deep research directly into the flow of work, helping users tackle complex, multi-step research tasks more efficiently.
When this will happen:
General Availability (Worldwide): Rollout will begin mid-July 2025 and will be available to all Microsoft 365 Copilot-licensed users.
How this affects your organization:
The Researcher agent, previously accessible only via the Left Nav as a standalone experience, will now also appear as a button in the M365 Copilot Prompt Box across Microsoft 365 apps, including Teams, Outlook, and the Copilot Chat experience.
Relevance
High
Service & monthly active users
Microsoft 365 Copilot
Message ID
MC1098163
Published
Jun 18, 2025
Tag
MAJOR UPDATE
ADMIN IMPACT
NEW FEATURE
USER IMPACT

Researcher on M365 Copilot Prompt Box

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Summary

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Relevance
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Service & monthly active users
Microsoft 365 Copilot

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Published
Jun 18, 2025

Tag
MAJOR UPDATE ADMIN IMPACT NEW FEATURE USER IMPACT

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Key benefits:

- Combines OpenAI's deep research model with Copilot's orchestration and search capabilities.
- Can reason over work and web data, including third-party data via connectors or other agents.
- No changes to existing functionality—this is an additional entry point for easier access.

Note: Only users with a Microsoft 365 Copilot license will see the Researcher agent in the Prompt Box.

What you can do to prepare:

No admin action is required to enable this feature.

Admins can manage agent availability via the Microsoft 365 admin center. For more information, refer to:

Manage agents for Microsoft 365 Copilot in the Microsoft 365 admin center - Microsoft 365 admin | Microsoft Learn.

Compliance considerations:

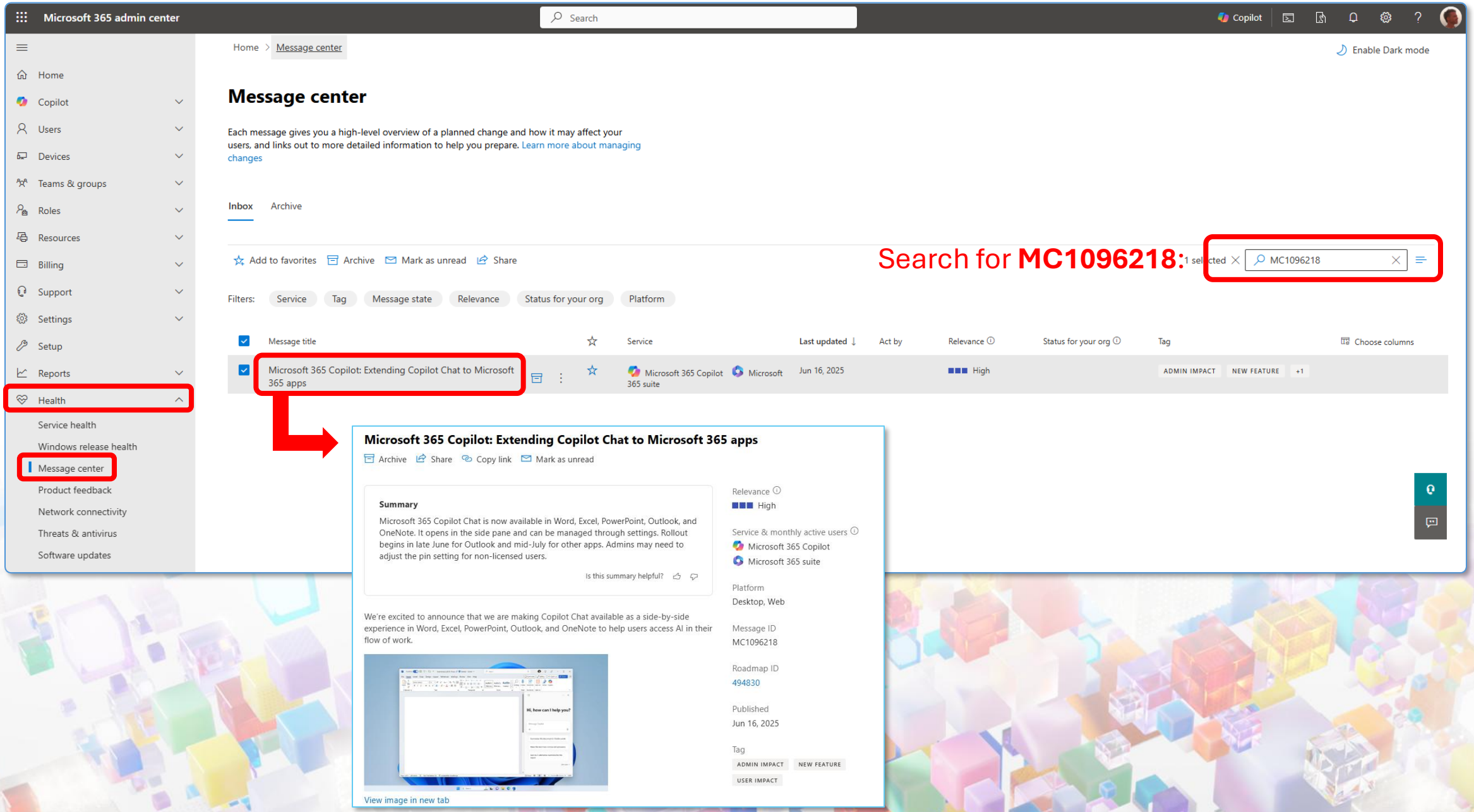
- Alters how existing customer data is processed, stored, or accessed: Maybe
- Introduces or modifies AI/ML capabilities that interact with customer data: Yes
- Provides new ways for users to interact with generative AI: Yes

What will be covered today?

- FY26 MCAPS Start for Partners & GTM Kickoff
- Microsoft Sovereign Cloud
- AI Agent Adoption Hub
- News about the Researcher agent
- **News about Copilot Chat**
- Redesigned Copilot Hub

Copilot Chat as a side-by-side experience in the Microsoft 365 apps

- **Copilot Chat** will become available as a side-by-side experience in Word, Excel, PowerPoint, Outlook, and OneNote to help users access AI in their flow of work.
- For Microsoft 365 Copilot Chat users, who do not have the M365 Copilot license, this change will bring Microsoft 365 Copilot Chat into a right pane experience and give the ability to reason over the currently open file.
- **Rollout starts in late June** and completes in the weeks following.
- Track this change on the public roadmap under ID 494830
- Check for **MC1096218** in the Message Center


Microsoft 365 admin center
Search
Copilot
Home
Message center
Enable Dark mode
Home
Copilot
Users
Devices
Teams & groups
Roles
Resources
Billing
Support
Settings
Setup
Reports
Health
Service health
Windows release health
Message center
Product feedback
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Threats & antivirus
Software updates
Message center
Each message gives you a high-level overview of a planned change and how it may affect your users, and links out to more detailed information to help you prepare. Learn more about managing changes
Inbox
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Archive
Mark as unread
Share
Search for MC1096218:
1 selected
MC1096218
Filters:
Service
Tag
Message state
Relevance
Status for your org
Platform
Message title
Service
Last updated
Act by
Relevance
Status for your org
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Choose columns
Microsoft 365 Copilot: Extending Copilot Chat to Microsoft 365 apps
Microsoft 365 Copilot
Microsoft 365 suite
Microsoft
Jun 16, 2025
High
ADMIN IMPACT
NEW FEATURE
+1
Microsoft 365 Copilot: Extending Copilot Chat to Microsoft 365 apps
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Summary
Microsoft 365 Copilot Chat is now available in Word, Excel, PowerPoint, Outlook, and OneNote. It opens in the side pane and can be managed through settings. Rollout begins in late June for Outlook and mid-July for other apps. Admins may need to adjust the pin setting for non-licensed users.
Is this summary helpful?
We're excited to announce that we are making Copilot Chat available as a side-by-side experience in Word, Excel, PowerPoint, Outlook, and OneNote to help users access AI in their flow of work.
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Relevance
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Service & monthly active users
Microsoft 365 Copilot
Microsoft 365 suite
Platform
Desktop, Web
Message ID
MC1096218
Roadmap ID
494830
Published
Jun 16, 2025
Tag
ADMIN IMPACT
NEW FEATURE
USER IMPACT

Microsoft 365 Copilot: Extending Copilot Chat to Microsoft 365 apps

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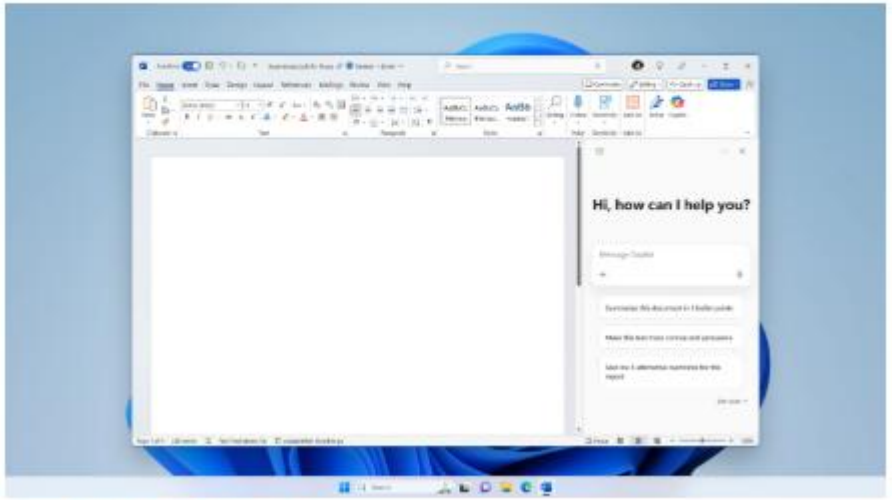

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Relevance
High

Service & monthly active users
Microsoft 365 Copilot
Microsoft 365 suite

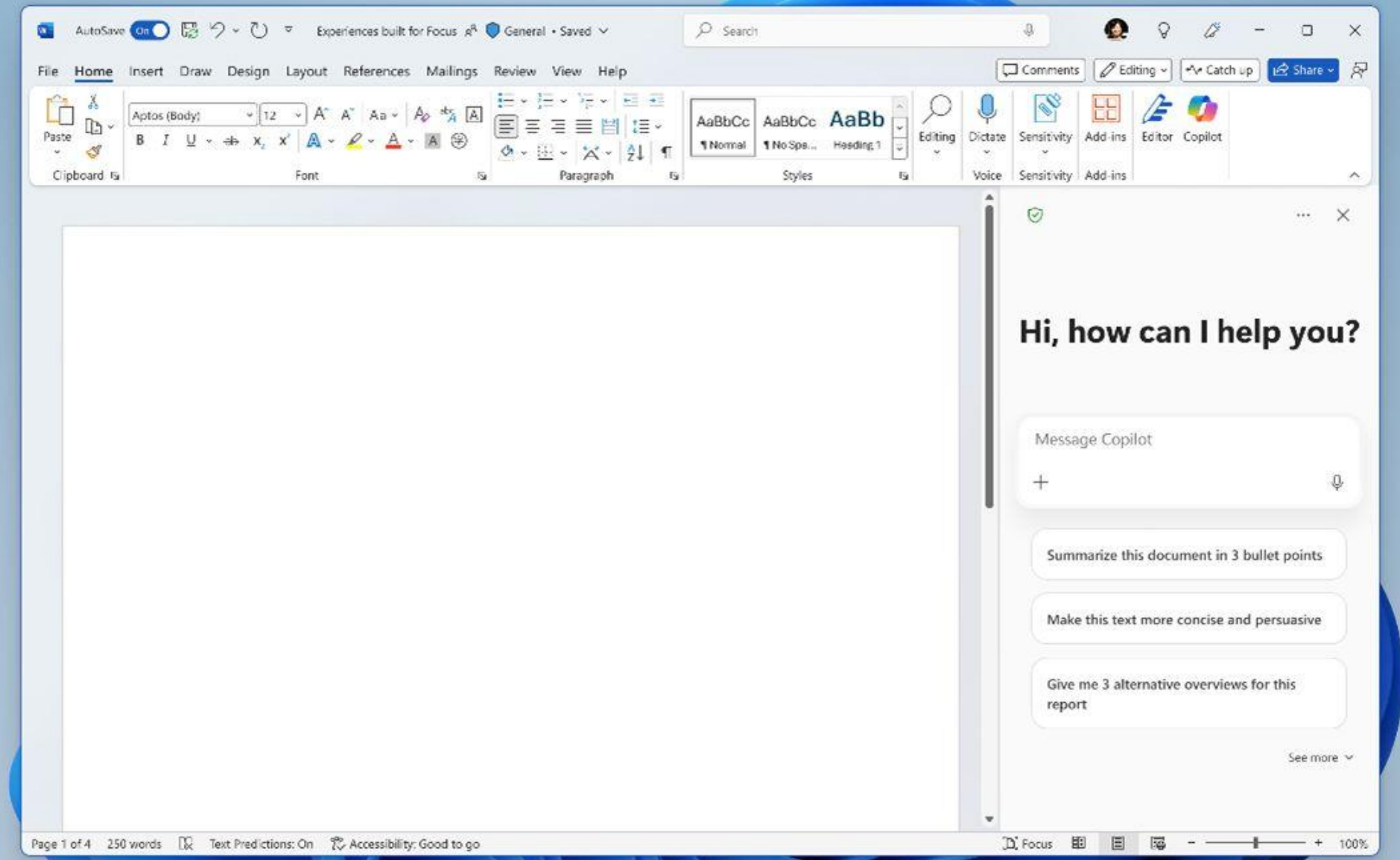
Platform
Desktop, Web

Message ID
MC1096218

Roadmap ID
494830

Published
Jun 16, 2025

Tag
ADMIN IMPACT NEW FEATURE USER IMPACT


AutoSave On
Experiences built for Focus
General • Saved
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Comments Editing Catch up Share
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Clipboard Font Paragraph Styles Voice Sensitivity Add-ins
Editing Dictate Sensitivity Add-ins Editor Copilot
AaBbCc ¶ Normal
AaBbCc ¶ No Spa...
AaBb Heading 1
Hi, how can I help you?
Message Copilot
Summarize this document in 3 bullet points
Make this text more concise and persuasive
Give me 3 alternative overviews for this report
See more
Page 1 of 4 250 words
Text Predictions: On
Accessibility: Good to go
Focus
100%
Search

Microsoft 365 Copilot: Extending Copilot Chat to Microsoft 365 apps

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Summary

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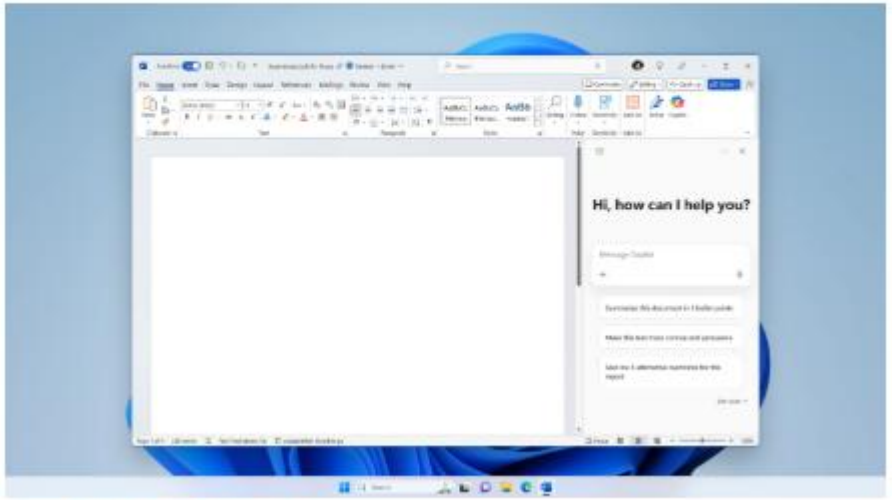

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Relevance
High

Service & monthly active users
Microsoft 365 Copilot
Microsoft 365 suite

Platform
Desktop, Web

Message ID
MC1096218

Roadmap ID
494830

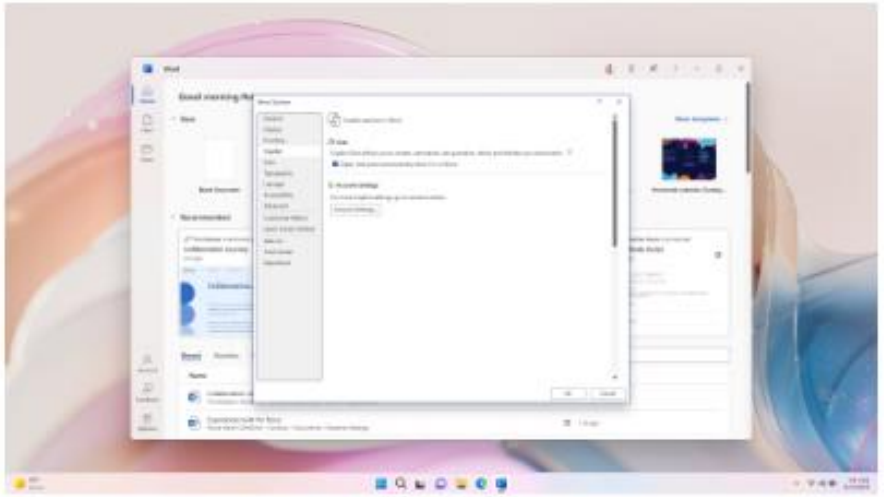
Published
Jun 16, 2025

Tag
ADMIN IMPACT NEW FEATURE USER IMPACT

View image in new tab

Copilot Chat in Word (Windows desktop) for users without a Microsoft 365 Copilot license. UI elements subject to change.

Copilot Chat will open in the side pane when a user opens a file. Users can manage this behavior through their settings in each app.



View image in new tab

Reference image of the Copilot settings menu in Word (Windows desktop). UI elements subject to change.

Copilot Chat will be available in these apps for users with a Microsoft 365 Copilot license, and for users without a Microsoft 365 Copilot license who have pinning enabled. We will update the text of the Pin Microsoft 365 Copilot Chat admin setting to reflect its expanded scope across Microsoft 365 apps.

Tag

ADMIN IMPACT NEW FEATURE USER IMPACT

Word

Home
New
Open
Account
Feedback
Options

Good morning Ro

New

Blank Document

More templates

Horizontal calendar (Sunday...

Recommended

Tim Deboer mentioned y
Collaboration Journey
5m ago

nathan Davis commented
Study Script

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Name

Collaboration Jo
Tim Deboer's OneD

Experiences built for focus
Mona Kane's OneDrive - Contoso » Documents » Business Strategy
11h ago

Word Options

General
Display
Proofing
Copilot
Save
Typography
Language
Accessibility
Advanced
Customize Ribbon
Quick Access Toolbar
Add-ins
Trust Center
Experiment

Copilot options in Word

Chat

Copilot Chat allows you to create, summarize, ask questions, refine, and elevate your documents.

Open chat pane automatically when I'm in Word

Account Settings

For more Copilot settings, go to account center.

Account Settings...

OK
Cancel

78°F
Sunny

9:41 AM
6/12/2025

View image in new tab

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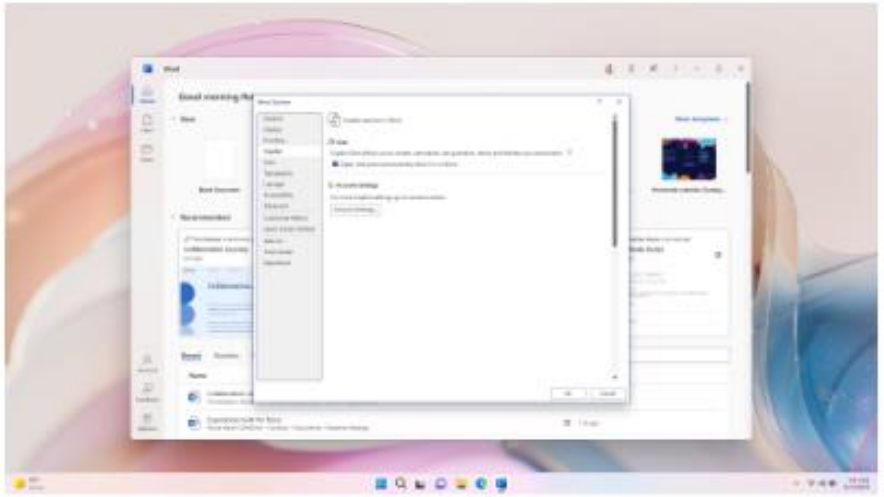

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Tag

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This message is associated with Microsoft 365 Roadmap ID 494830

When this will happen:

General Availability:

- **Outlook for Web, new Outlook for Windows, and classic Outlook for Windows:** Rollout of this change starts in late June and completes in the weeks following.
- **Outlook for Mac:** Rollout of this change for Mac starts in mid-July and completes in the weeks following.
- **Word, Excel, PowerPoint, OneNote (Web, Mac, Windows):** Rollout of this change starts in mid-July and completes in the weeks following.
    - Mobile (Word/PowerPoint) / iPad (all) rollout will start no earlier than August.

What you need to do to prepare:

No admin action is required. However, if your Pin Microsoft 365 Copilot Chat admin setting is configured to "Do not pin," you should adjust it to "Pin" if you want your users without a Microsoft 365 Copilot license to access Copilot Chat in their Microsoft 365 apps.

Learn more about pinning and managing Copilot Chat: Manage Microsoft 365 Copilot Chat | Microsoft Learn.

Compliance considerations:

- Does the change alter how existing customer data is processed, stored, or accessed? No.

- **Outlook for Web, new Outlook for Windows, and classic Outlook for Windows:** Rollout of this change starts in late June and completes in the weeks following.
- **Outlook for Mac:** Rollout of this change for Mac starts in mid-July and completes in the weeks following.
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    - Mobile (Word/PowerPoint) / iPad (all) rollout will start no earlier than August.

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Learn more about pinning and managing Copilot Chat: Manage Microsoft 365 Copilot Chat | Microsoft Learn.

Compliance considerations:

- Does the change alter how existing customer data is processed, stored, or accessed? No.
- Does the change introduce or significantly modify AI/ML or agent capabilities that interact with or provide access to customer data? No.
- Does the change provide a new way of communicating between users, tenants, or subscriptions? No.
- Does the change provide end users any new way of interacting with generative AI? No.

What will be covered today?

- FY26 MCAPS Start for Partners & GTM Kickoff
- Microsoft Sovereign Cloud
- AI Agent Adoption Hub
- News about the Researcher agent
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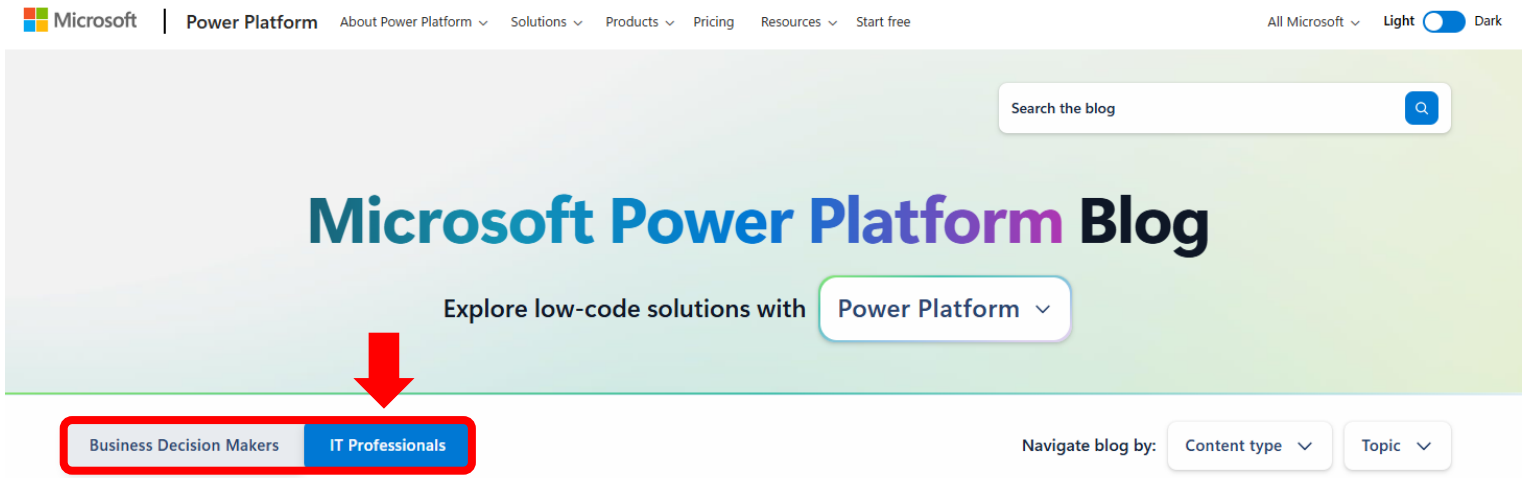
- **Redesigned Copilot Hub**

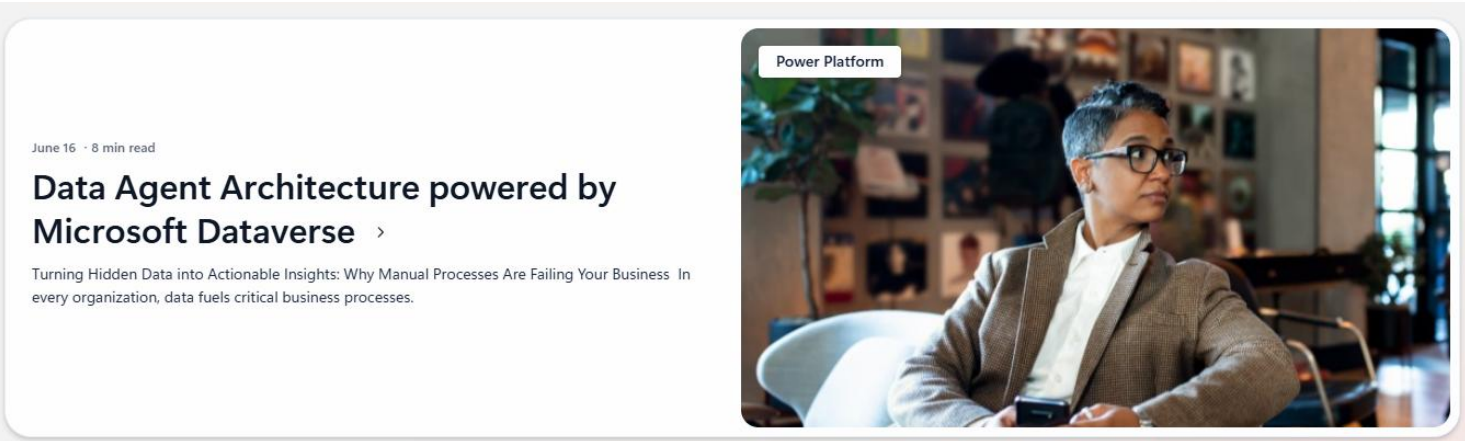
Redesigned Copilot hub

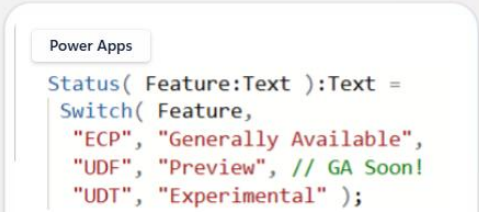
Microsoft Power Platform Blog

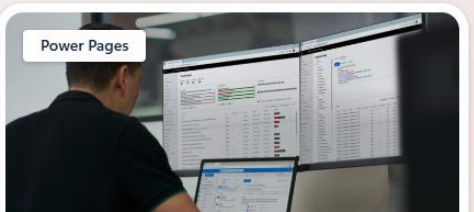
> Experience the redesigned Copilot hub

Microsoft Power Platform Blog > Experience the redesigned Copilot hub









Power Platform

June 16 · 8 min read

Data Agent Architecture powered by Microsoft Dataverse ›

Turning Hidden Data into Actionable Insights: Why Manual Processes Are Failing Your Business In every organization, data fuels critical business processes.

Power Apps

```
Status( Feature:Text ):Text =
 Switch( Feature,
  "ECP", "Generally Available",
  "UDF", "Preview", // GA Soon!
  "UDT", "Experimental" );
```

June 18 · 2 min read

Enhanced Component Properties, User Defined Functions, and UntypedObjects on the move ›

Taking another big step forward, Enhanced Component Properties (ECP) are now generally available (GA) and ready for your production workloads! ECPs are a great way to modularize and reuse your logic across an app, with the added bonus that ECPs can be shared across apps through a component library.

Copilot Studio

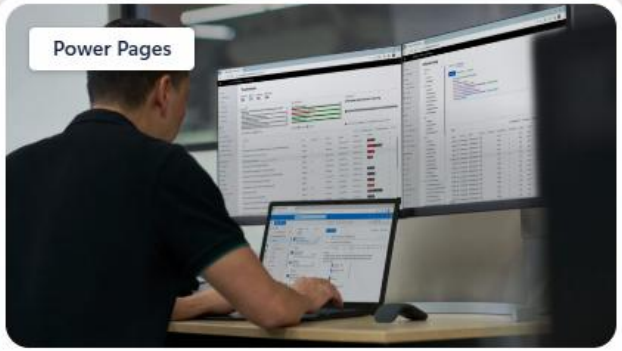
upwork + Microsoft Power Platform

June 16 · 1 min read

Empowering a New Era of Agent-Based Experiences: Upwork and Microsoft Power Platform Partnership ›

We are entering a new era of work—one where low code and agent-based experiences are reshaping how we create and collaborate.

Power Pages

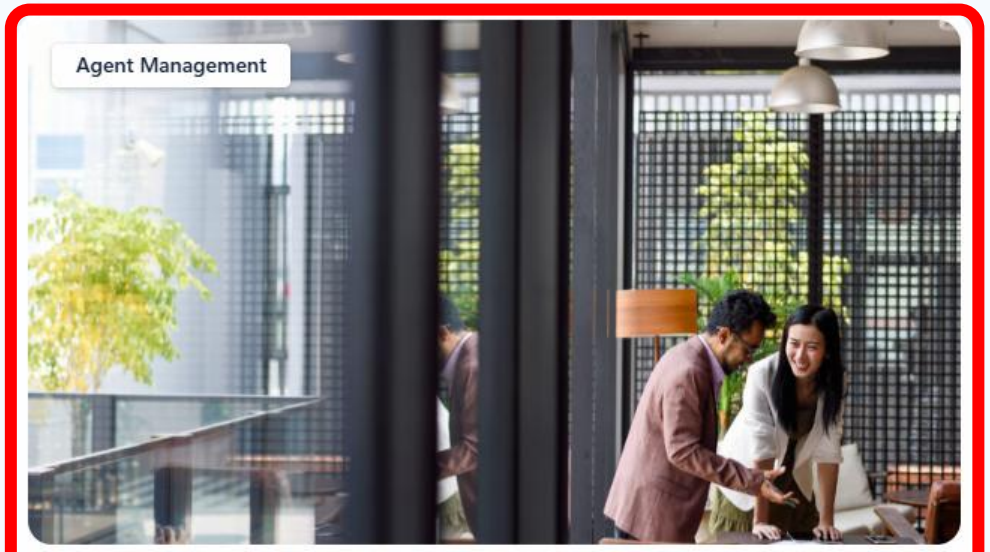


June 17 · 1 min read

Enable Natural Language Search for Lists in Power Pages (Preview) ›

We're pleased to introduce a key usability enhancement for lists in Power Pages: Natural Language (NL) Search.

Management and governance



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Experience the redesigned Copilot hub ›

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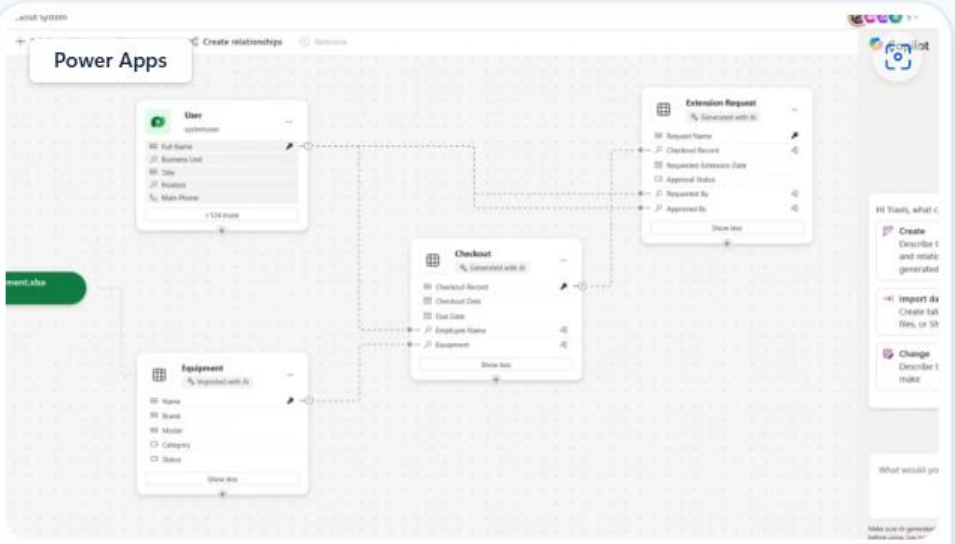

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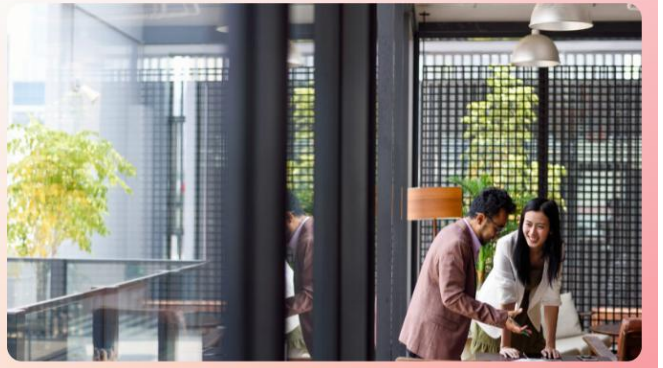
What's new in Power Apps: May 2025 Feature Update ›

Build 2025 Sessions We had a great set of sessions at Microsoft Build, you can watch the recordings on demand to catch up! AI-powered Development Check out what's new in this month's Power Apps Pulse! Make plans for your existing solutions, import data from multiple worksheets in an Excel workbook, get rich AI-powered summaries of [...]

View all management and governance

Operations



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By Amy Chern

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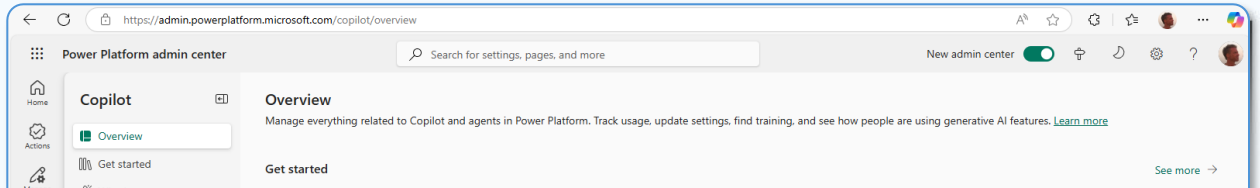

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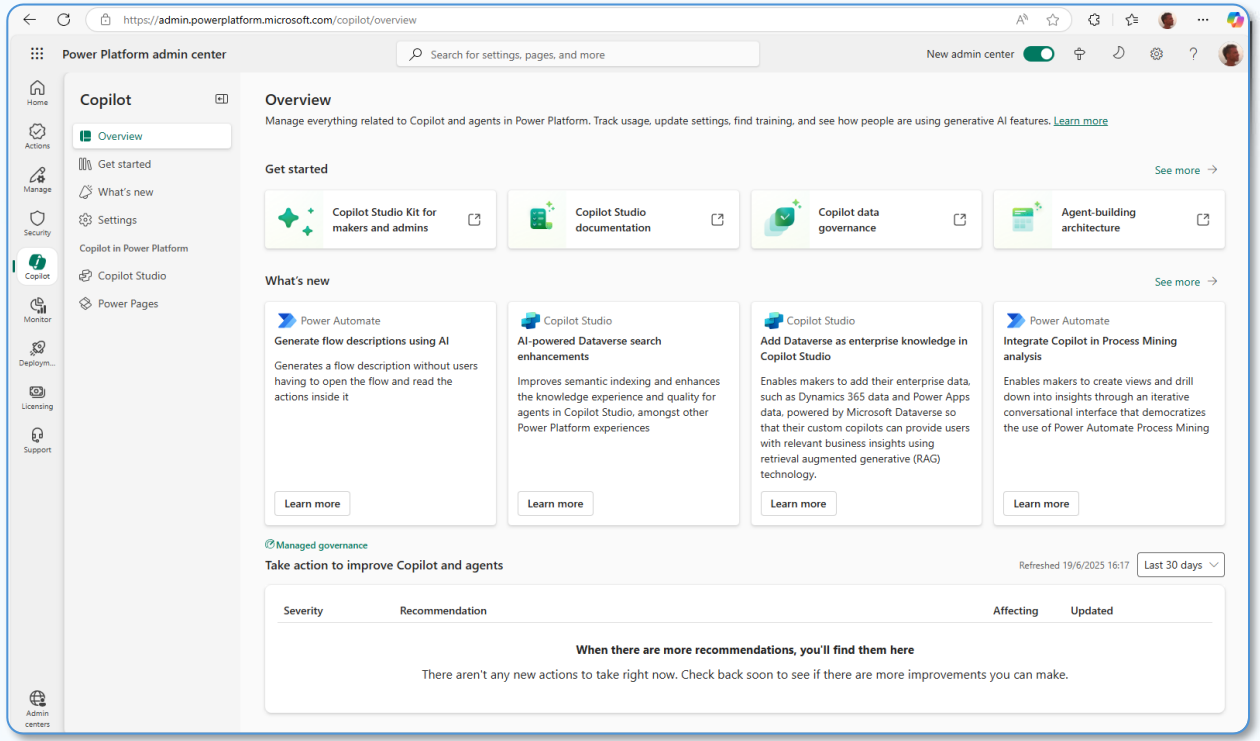

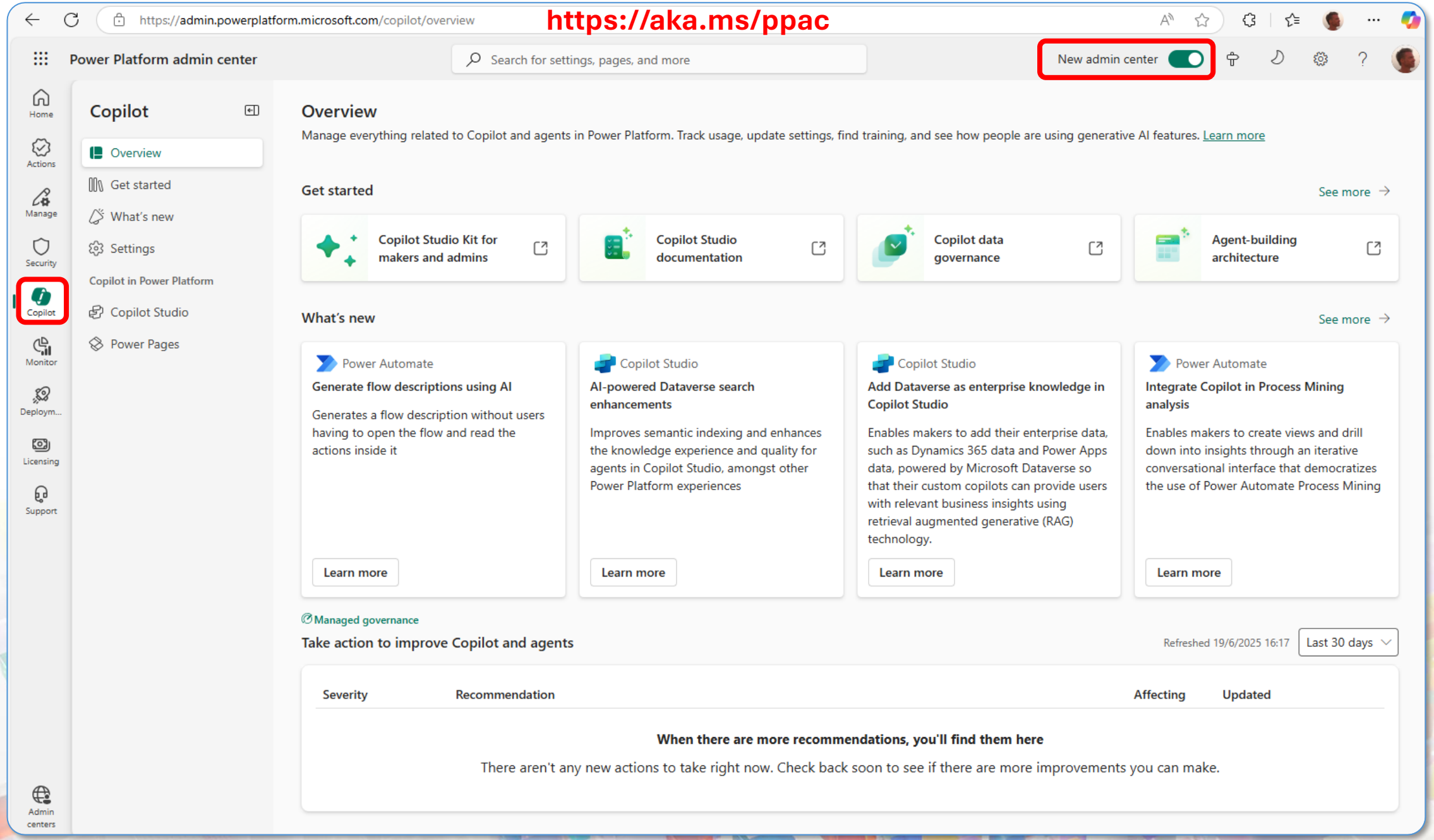
https://admin.powerplatform.microsoft.com/copilot/overview
https://aka.ms/ppac
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Get started
What's new
Settings
Copilot in Power Platform
Copilot Studio
Power Pages
Overview
Manage everything related to Copilot and agents in Power Platform. Track usage, update settings, find training, and see how people are using generative AI features. Learn more
Get started
See more
Copilot Studio Kit for makers and admins
Copilot Studio documentation
Copilot data governance
Agent-building architecture
What's new
See more
Power Automate
Generate flow descriptions using AI
Generates a flow description without users having to open the flow and read the actions inside it
Learn more
Copilot Studio
AI-powered Dataverse search enhancements
Improves semantic indexing and enhances the knowledge experience and quality for agents in Copilot Studio, amongst other Power Platform experiences
Learn more
Copilot Studio
Add Dataverse as enterprise knowledge in Copilot Studio
Enables makers to add their enterprise data, such as Dynamics 365 data and Power Apps data, powered by Microsoft Dataverse so that their custom copilots can provide users with relevant business insights using retrieval augmented generative (RAG) technology.
Learn more
Power Automate
Integrate Copilot in Process Mining analysis
Enables makers to create views and drill down into insights through an iterative conversational interface that democratizes the use of Power Automate Process Mining
Learn more
Managed governance
Take action to improve Copilot and agents
Refreshed 19/6/2025 16:17
Last 30 days
Severity
Recommendation
Affecting
Updated
When there are more recommendations, you'll find them here
There aren't any new actions to take right now. Check back soon to see if there are more improvements you can make.

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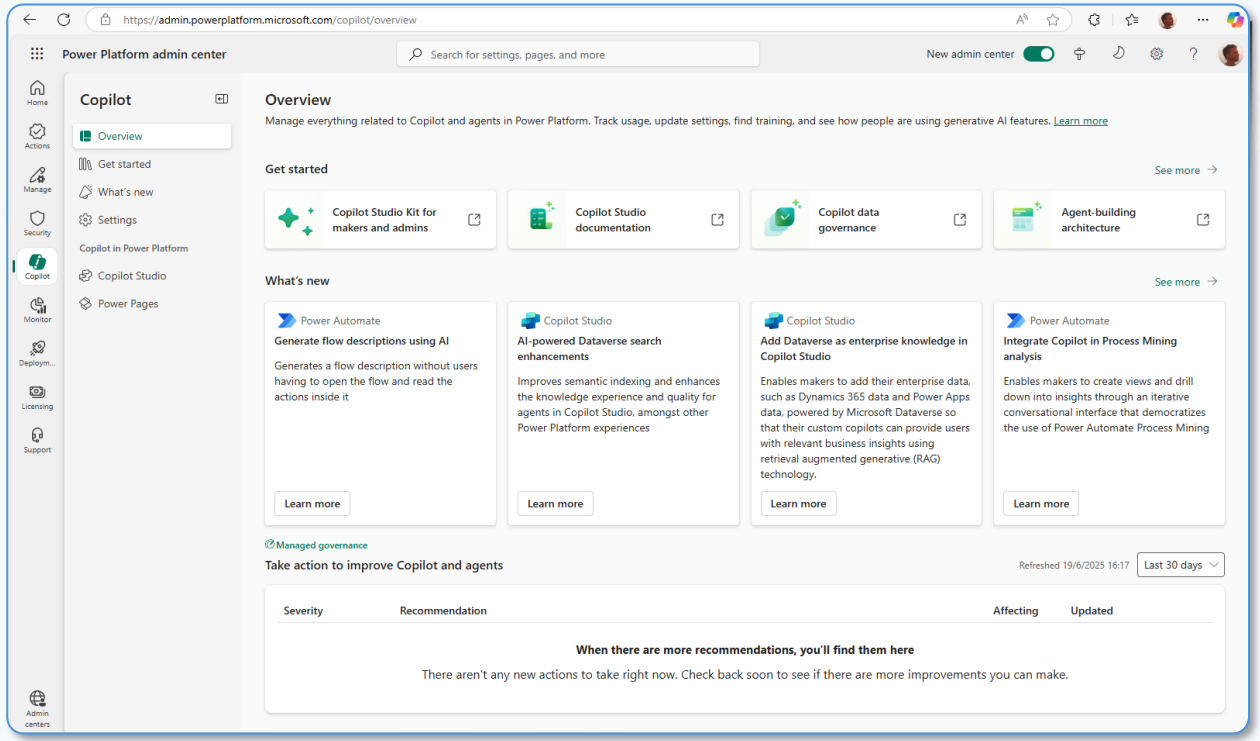
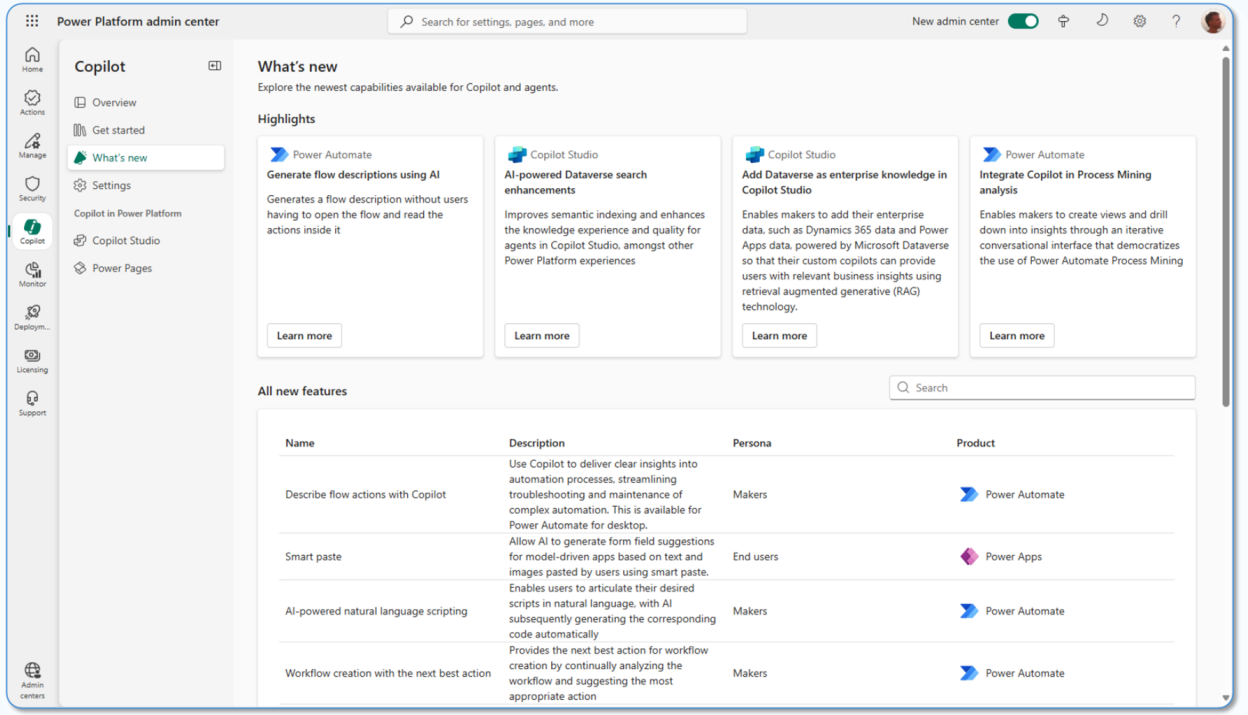
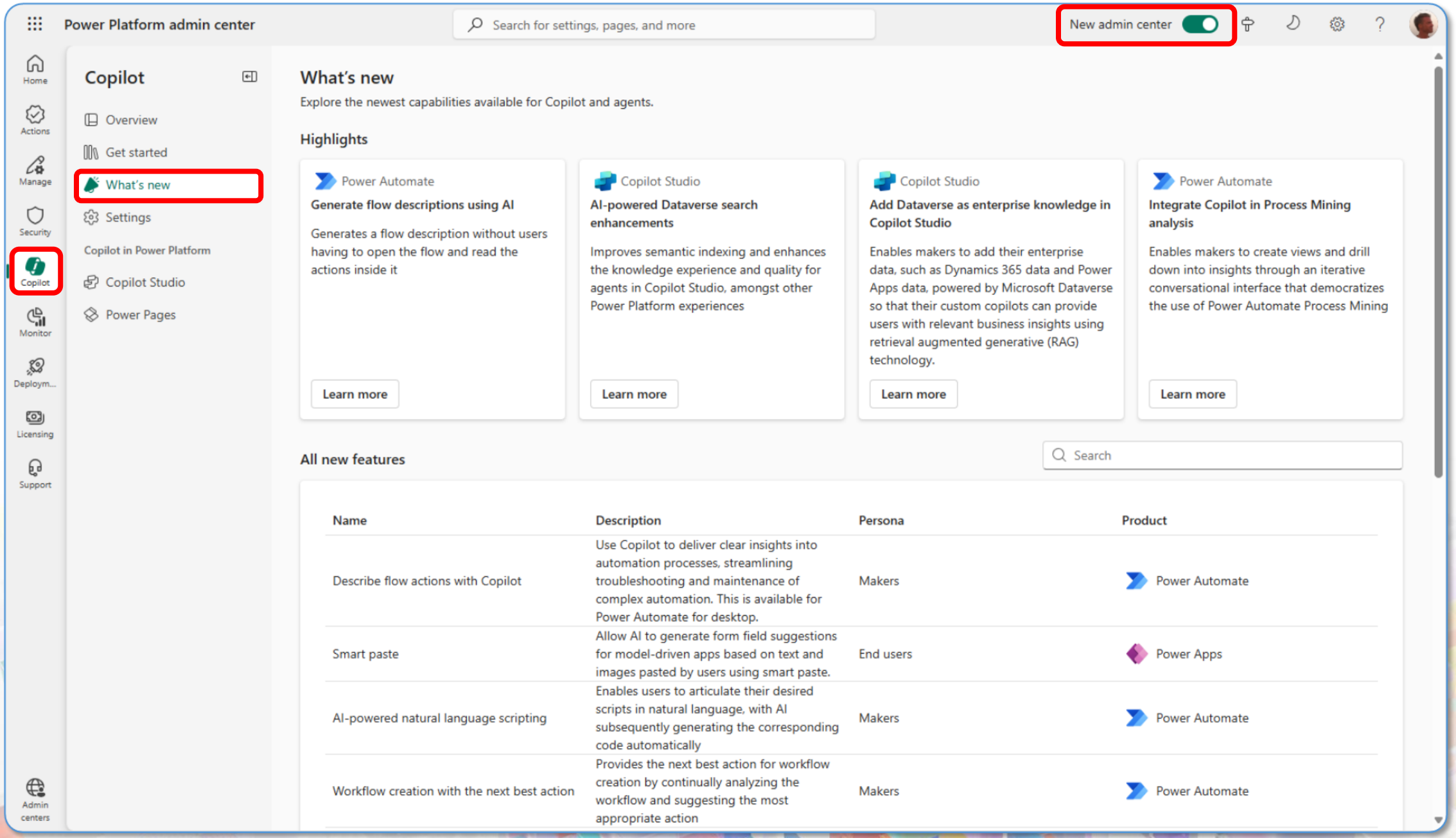


Transparency and visibility: No more surprises in what's coming

We heard your feedback for more clarity and heads-up about new Copilot features. In response, we built a "What's new" page in the Copilot hub that gives you a centralized view of upcoming Copilot and AI capabilities. Instead of scrambling to catch up with release notes or blog posts, you can now see upcoming features within the "What's new" page in Copilot hub. For each new announcement, you'll see what the capability is, how it might impact your organization, and how to prepare your environments ahead of time. Visit the "What's new" page now in Copilot hub to learn about upcoming features, and stay ahead of the curve for smooth, managed rollouts.

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All new features
Search
Name
Description
Persona
Product
Describe flow actions with Copilot
Use Copilot to deliver clear insights into automation processes, streamlining troubleshooting and maintenance of complex automation. This is available for Power Automate for desktop.
Makers
Power Automate
Smart paste
Allow AI to generate form field suggestions for model-driven apps based on text and images pasted by users using smart paste.
End users
Power Apps
AI-powered natural language scripting
Enables users to articulate their desired scripts in natural language, with AI subsequently generating the corresponding code automatically
Makers
Power Automate
Workflow creation with the next best action
Provides the next best action for workflow creation by continually analyzing the workflow and suggesting the most appropriate action
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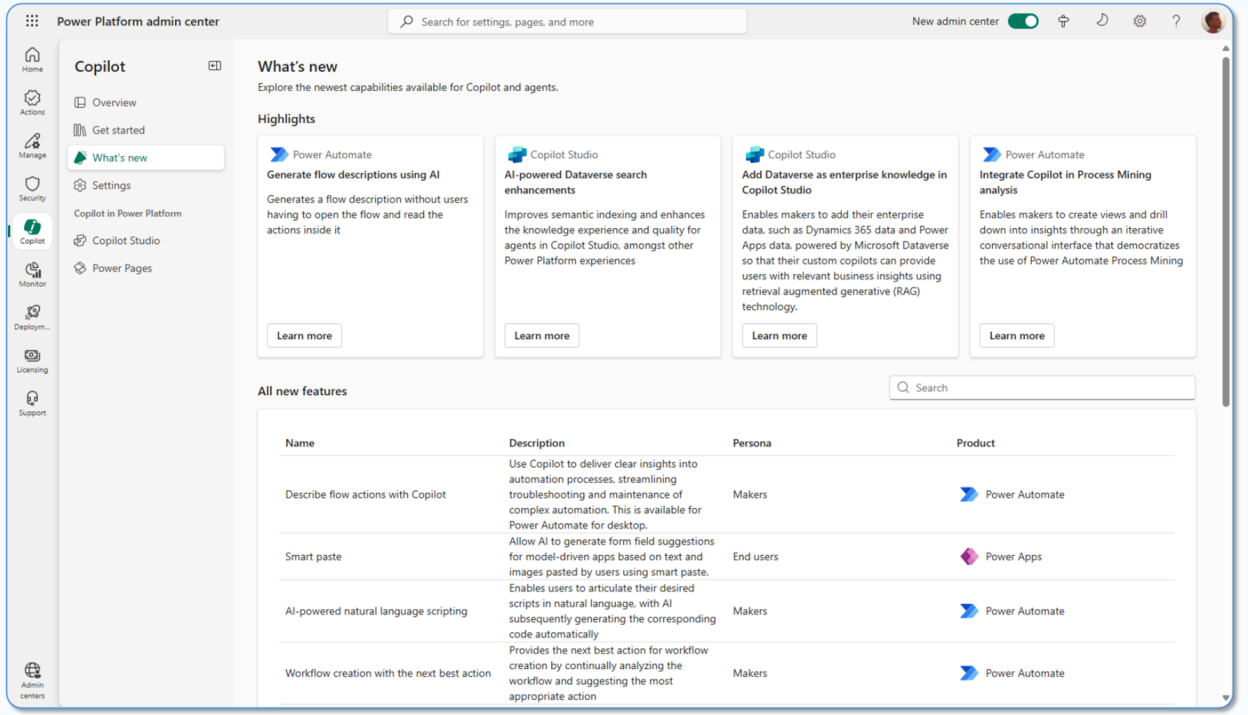
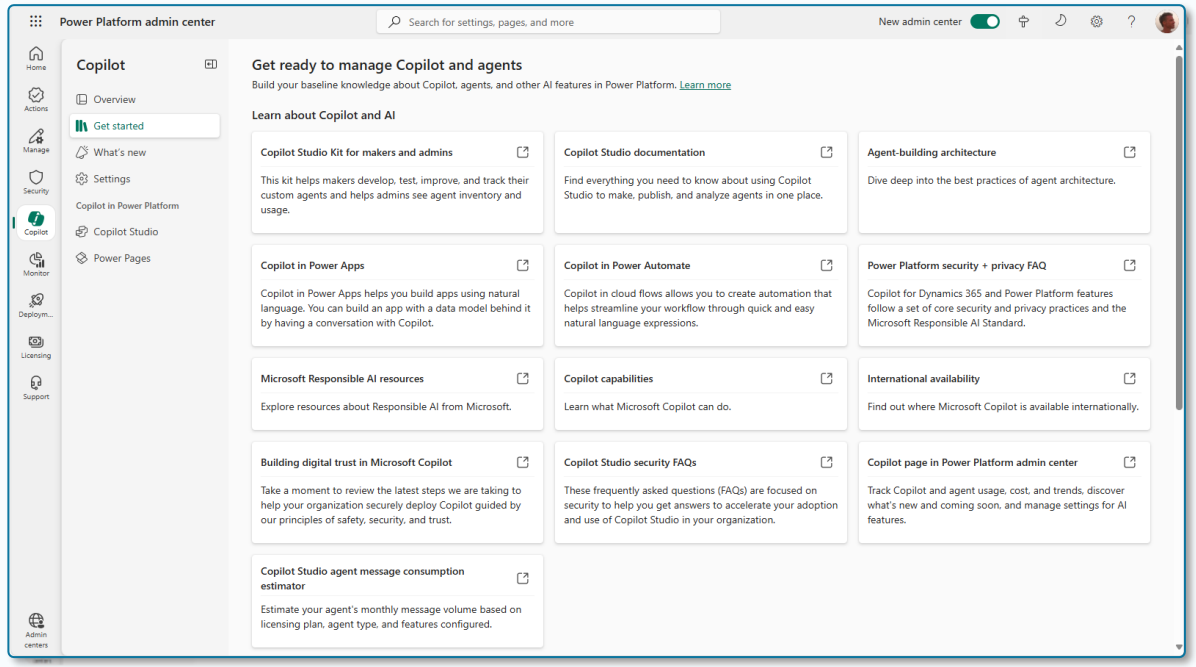
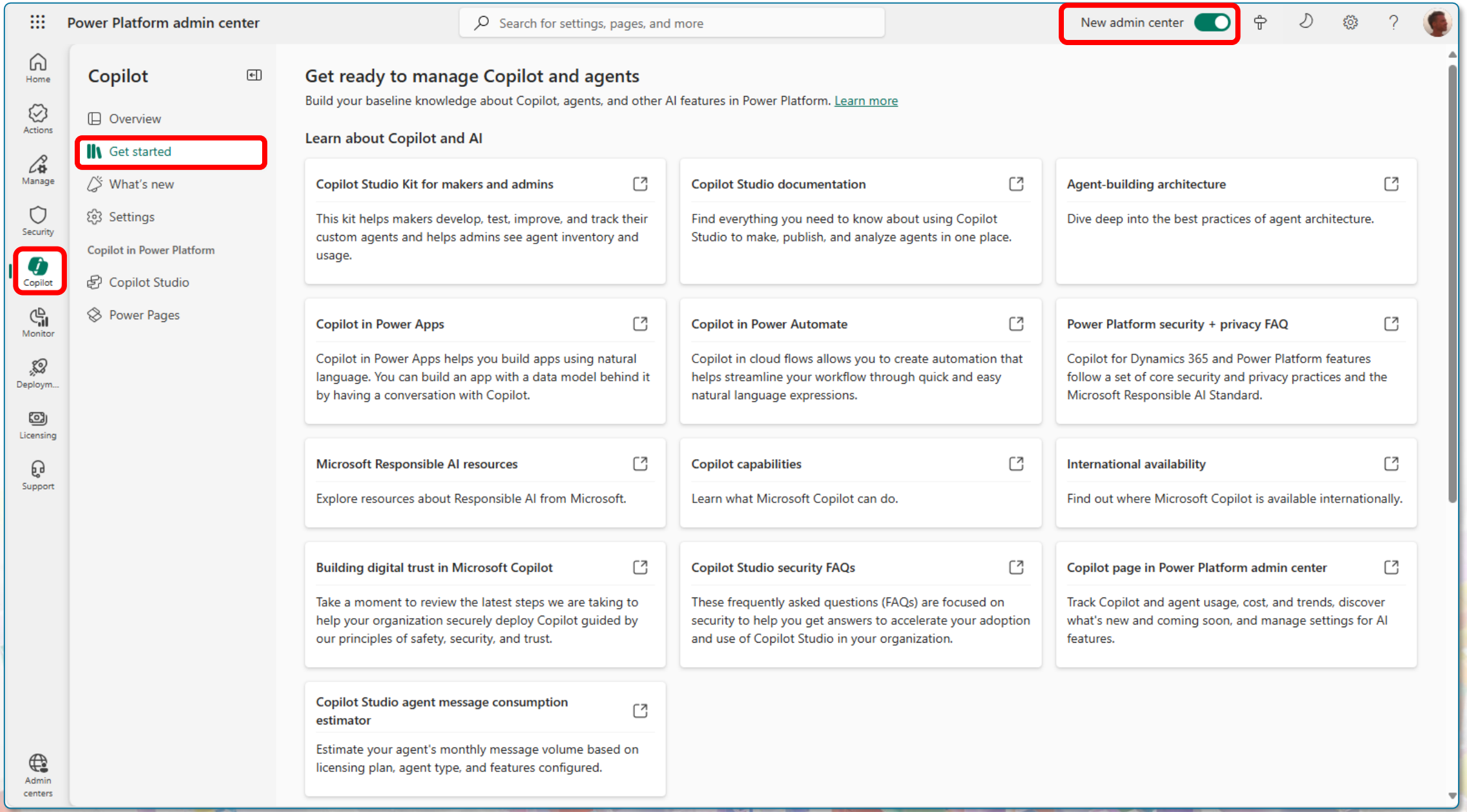


Get started: Resources & best practices to accelerate your Copilot and agent journey

Adopting Copilot and Copilot Studio agents can be a journey, so we've added a dedicated "Get Started" page in Copilot hub loaded with resources and tools to set you up for success. One highlight is the Copilot Studio Kit – a comprehensive toolkit that helps makers develop, test, improve, and track Copilot Studio agents. It also includes an agent inventory dashboard, which provides a tenant-wide view of all Copilot Studio agents in the organization – with details on which features they use, knowledge sources, and more. We've also included a curated **best-practice guide for Copilot Studio architecture and governance**. Be sure to explore this section to leverage best practices throughout your AI journey.

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Get ready to manage Copilot and agents
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Learn about Copilot and AI
Copilot Studio Kit for makers and admins
This kit helps makers develop, test, improve, and track their custom agents and helps admins see agent inventory and usage.
Copilot Studio documentation
Find everything you need to know about using Copilot Studio to make, publish, and analyze agents in one place.
Agent-building architecture
Dive deep into the best practices of agent architecture.
Copilot in Power Apps
Copilot in Power Apps helps you build apps using natural language. You can build an app with a data model behind it by having a conversation with Copilot.
Copilot in Power Automate
Copilot in cloud flows allows you to create automation that helps streamline your workflow through quick and easy natural language expressions.
Power Platform security + privacy FAQ
Copilot for Dynamics 365 and Power Platform features follow a set of core security and privacy practices and the Microsoft Responsible AI Standard.
Microsoft Responsible AI resources
Explore resources about Responsible AI from Microsoft.
Copilot capabilities
Learn what Microsoft Copilot can do.
International availability
Find out where Microsoft Copilot is available internationally.
Building digital trust in Microsoft Copilot
Take a moment to review the latest steps we are taking to help your organization securely deploy Copilot guided by our principles of safety, security, and trust.
Copilot Studio security FAQs
These frequently asked questions (FAQs) are focused on security to help you get answers to accelerate your adoption and use of Copilot Studio in your organization.
Copilot page in Power Platform admin center
Track Copilot and agent usage, cost, and trends, discover what's new and coming soon, and manage settings for AI features.
Copilot Studio agent message consumption estimator
Estimate your agent's monthly message volume based on licensing plan, agent type, and features configured.

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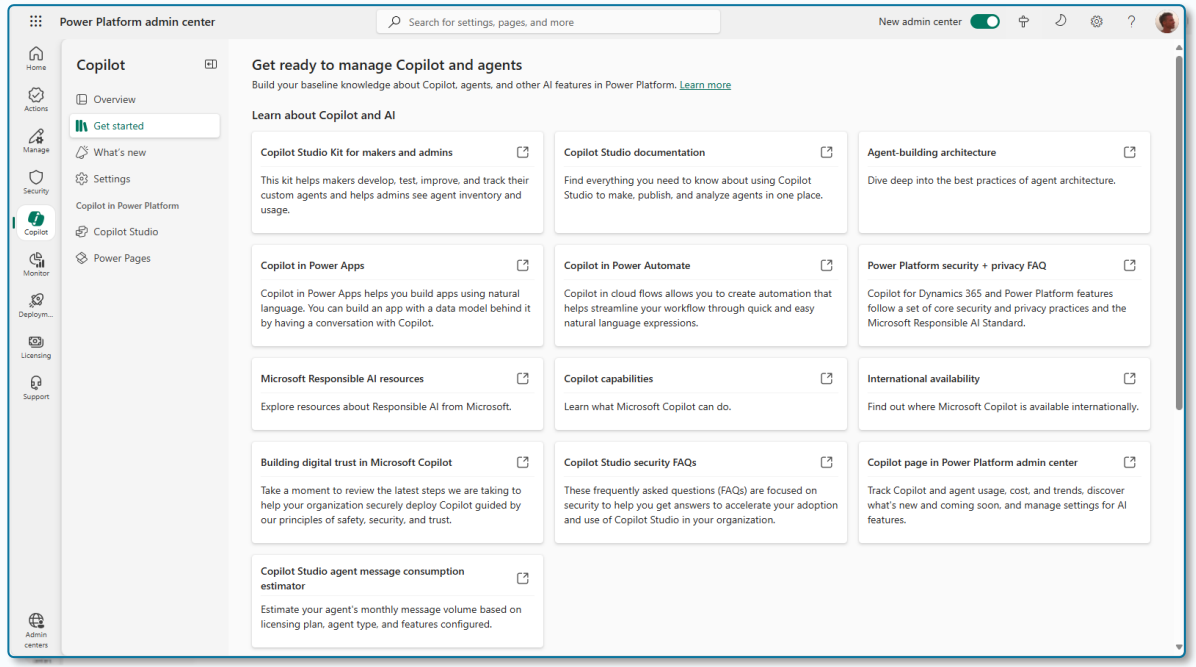

Usage and cost insights: Measure Copilot and agent impact

Another clear ask we heard from customers was better analytics – richer insights into how Copilot and Copilot Studio agents are actually being used, so you can determine their value. The updated Copilot hub delivers **new usage dashboards and metrics that go far beyond basic counts, helping you connect Copilot usage to business impact**. If a Copilot feature or Copilot Studio agent has high usage, you'll see evidence to support expanding it. In the Copilot Hub, each supported product now has its own analytics page with detailed usage and cost-related insights

Copilot Studio: Agent success at a scale

You'll get an overview of **how many Copilot Studio agents are active in the last 28 days**, and an agent success rate (e.g. percentage of chatbot sessions that were successfully resolved). The hub even ranks your **top 10 Copilot Studio agents by monthly active sessions** – effectively showing you which Copilot Studio agents are the most "impactful" or popular in your org. This makes it easy to identify your most valuable solutions so far, and double down on those success stories.

Integrated Cost Tracking: We know usage goes hand-in-hand with cost and licensing considerations. The Copilot hub doesn't leave you guessing here either. **Licensing details and cost insights are built into these pages**, with links into the Power Platform Licensing page for more information. For instance, on the Copilot Studio product page you can quickly jump to the Licensing page to

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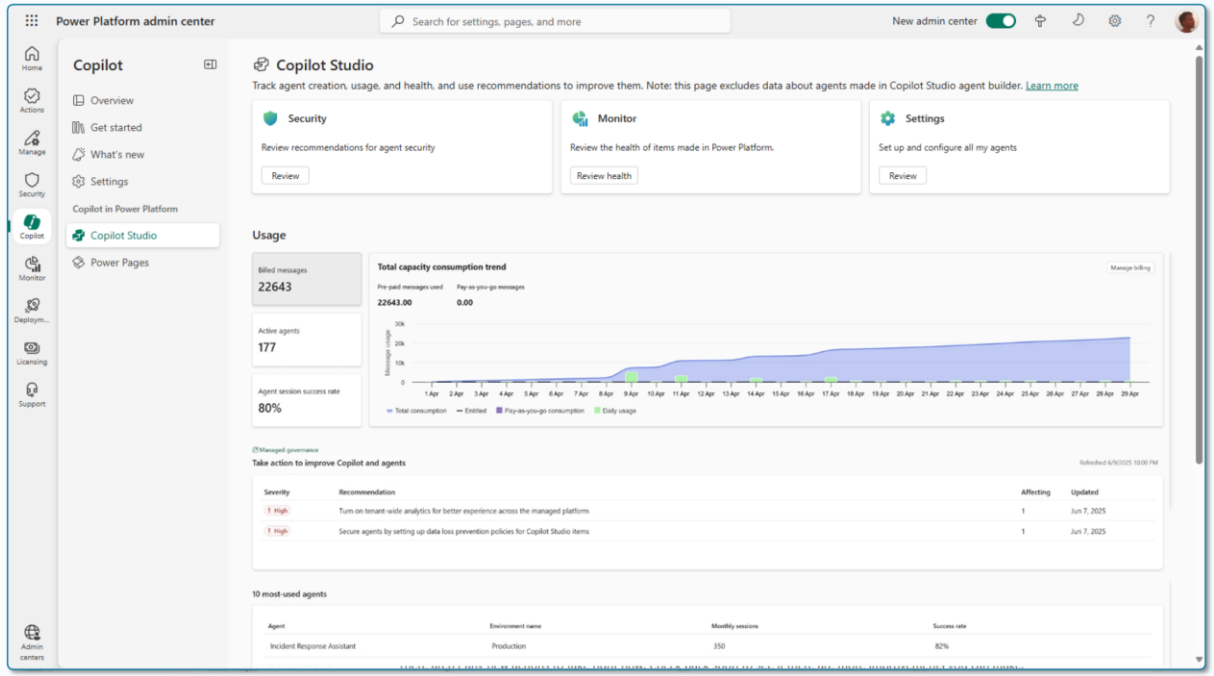

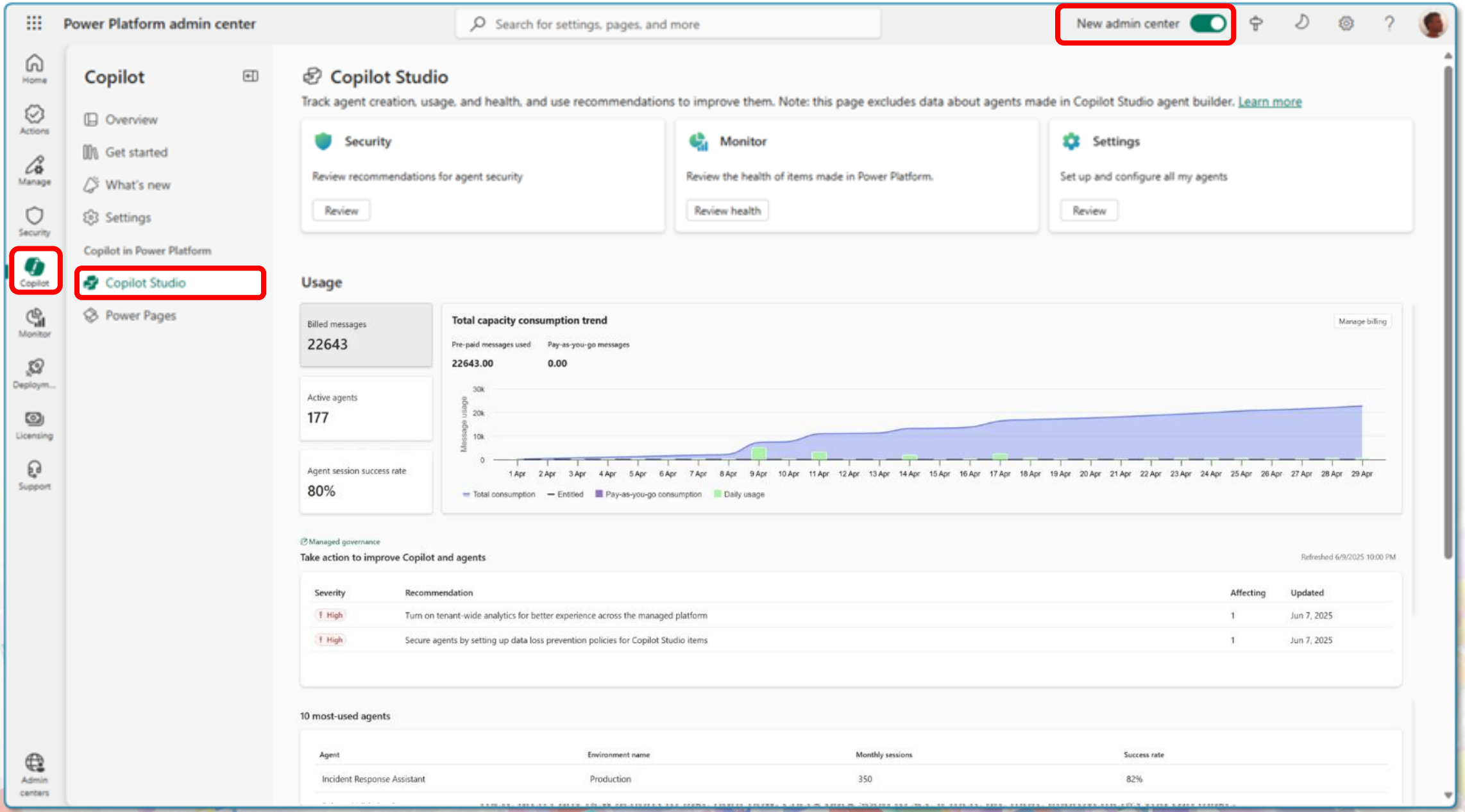
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Copilot Studio
Track agent creation, usage, and health, and use recommendations to improve them. Note: this page excludes data about agents made in Copilot Studio agent builder. Learn more
Security
Review recommendations for agent security
Review
Monitor
Review the health of items made in Power Platform.
Review health
Settings
Set up and configure all my agents
Review
Usage
Billed messages
22643
Active agents
177
Agent session success rate
80%
Total capacity consumption trend
Manage billing
Pre-paid messages used
22643.00
Pay-as-you-go messages
0.00
Message usage
30k
20k
10k
0
1 Apr 2 Apr 3 Apr 4 Apr 5 Apr 6 Apr 7 Apr 8 Apr 9 Apr 10 Apr 11 Apr 12 Apr 13 Apr 14 Apr 15 Apr 16 Apr 17 Apr 18 Apr 19 Apr 20 Apr 21 Apr 22 Apr 23 Apr 24 Apr 25 Apr 26 Apr 27 Apr 28 Apr 29 Apr
Total consumption
Entitled
Pay-as-you-go consumption
Daily usage
Managed governance
Take action to improve Copilot and agents
Refreshed 6/9/2025 10:00 PM
Severity
Recommendation
Affecting
Updated
High
Turn on tenant-wide analytics for better experience across the managed platform
1
Jun 7, 2025
High
Secure agents by setting up data loss prevention policies for Copilot Studio items
1
Jun 7, 2025
10 most-used agents
Agent
Environment name
Monthly sessions
Success rate
Incident Response Assistant
Production
350
82%

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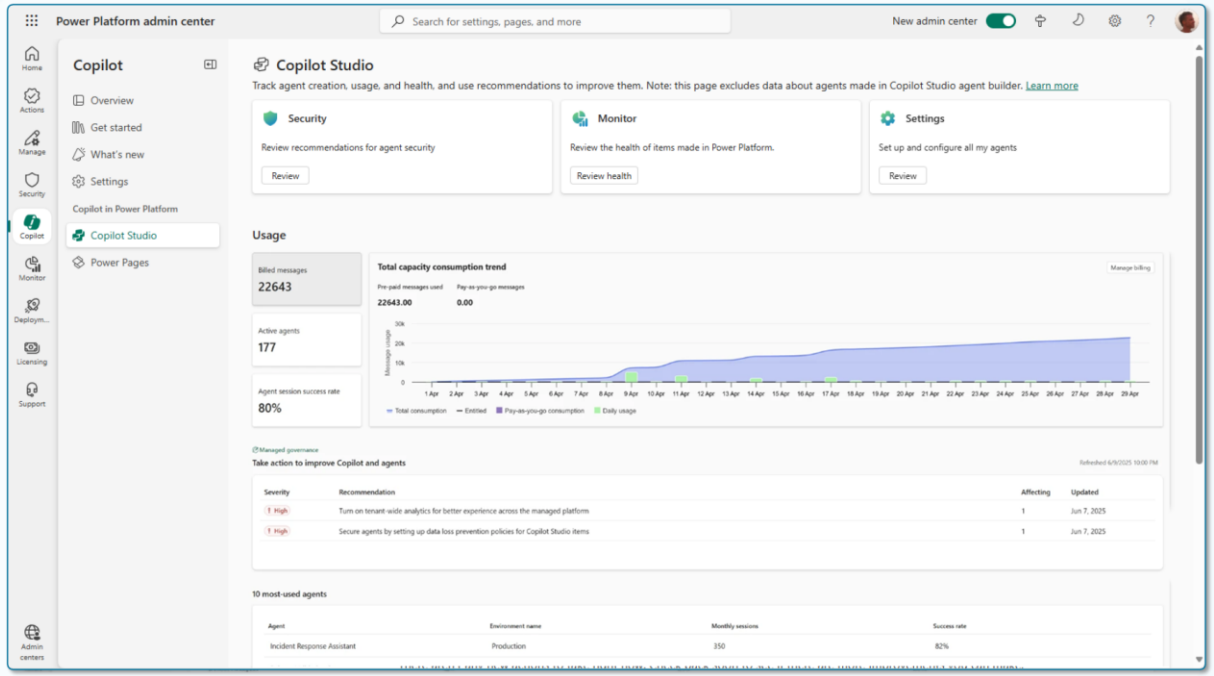
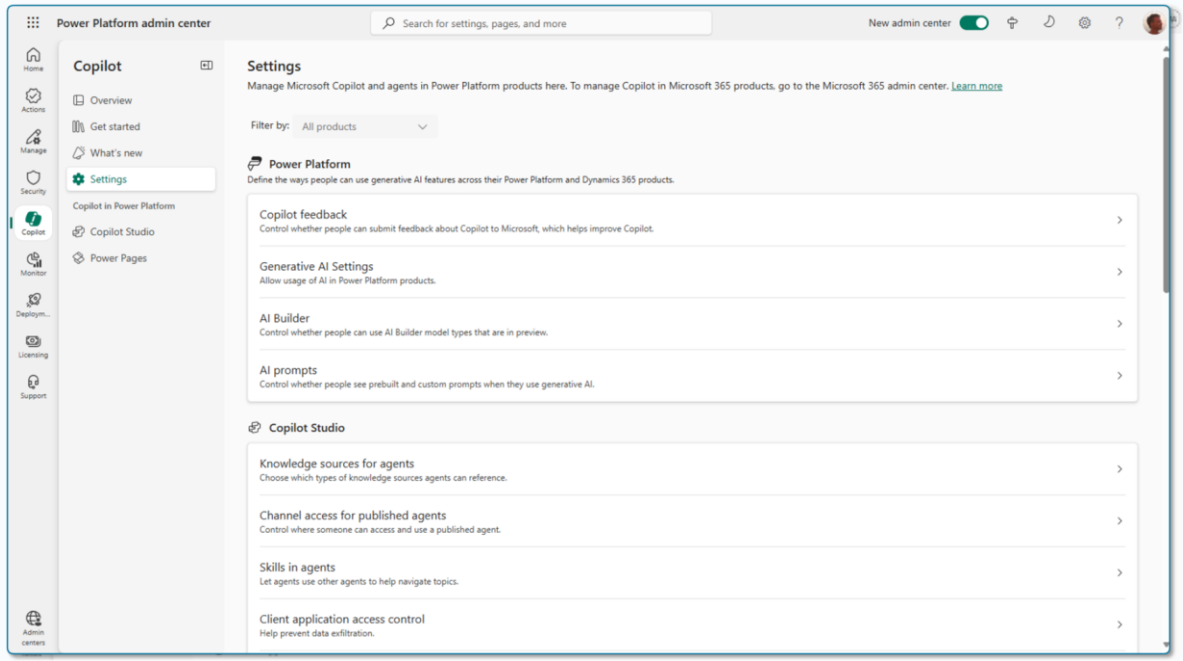
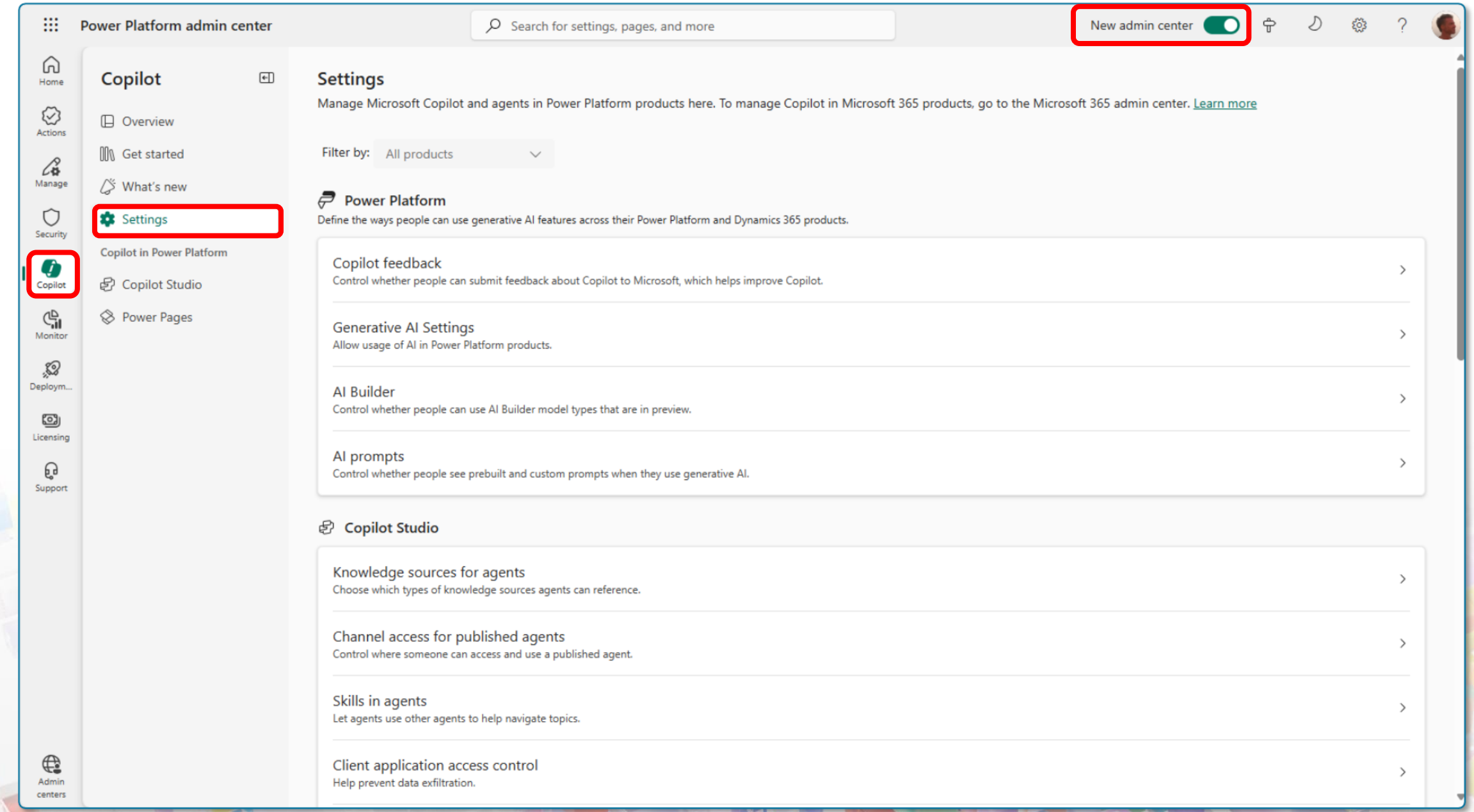


Centralized Management: One stop for Copilot and agent settings

The third major feedback we've heard from admins is that managing Copilot settings is too fragmented making discoverability challenging. In the new Copilot hub experience, we introduced a new "Settings" page to centralize Copilot settings into a single place – making it easier to govern Copilot and Copilot Studio agents across environments.

The "Settings" page now aggregates settings across Power Platform products. Here you'll be able to configure global settings like Bing Search, data movement across regions, and feedback, as well as product-specific settings across Copilot Studio, Power Apps, Power Pages, and Power Automate.

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Manage Microsoft Copilot and agents in Power Platform products here. To manage Copilot in Microsoft 365 products, go to the Microsoft 365 admin center. Learn more
Filter by: All products
Power Platform
Define the ways people can use generative AI features across their Power Platform and Dynamics 365 products.
Copilot feedback
Control whether people can submit feedback about Copilot to Microsoft, which helps improve Copilot.
Generative AI Settings
Allow usage of AI in Power Platform products.
AI Builder
Control whether people can use AI Builder model types that are in preview.
AI prompts
Control whether people see prebuilt and custom prompts when they use generative AI.
Copilot Studio
Knowledge sources for agents
Choose which types of knowledge sources agents can reference.
Channel access for published agents
Control where someone can access and use a published agent.
Skills in agents
Let agents use other agents to help navigate topics.
Client application access control
Help prevent data exfiltration.

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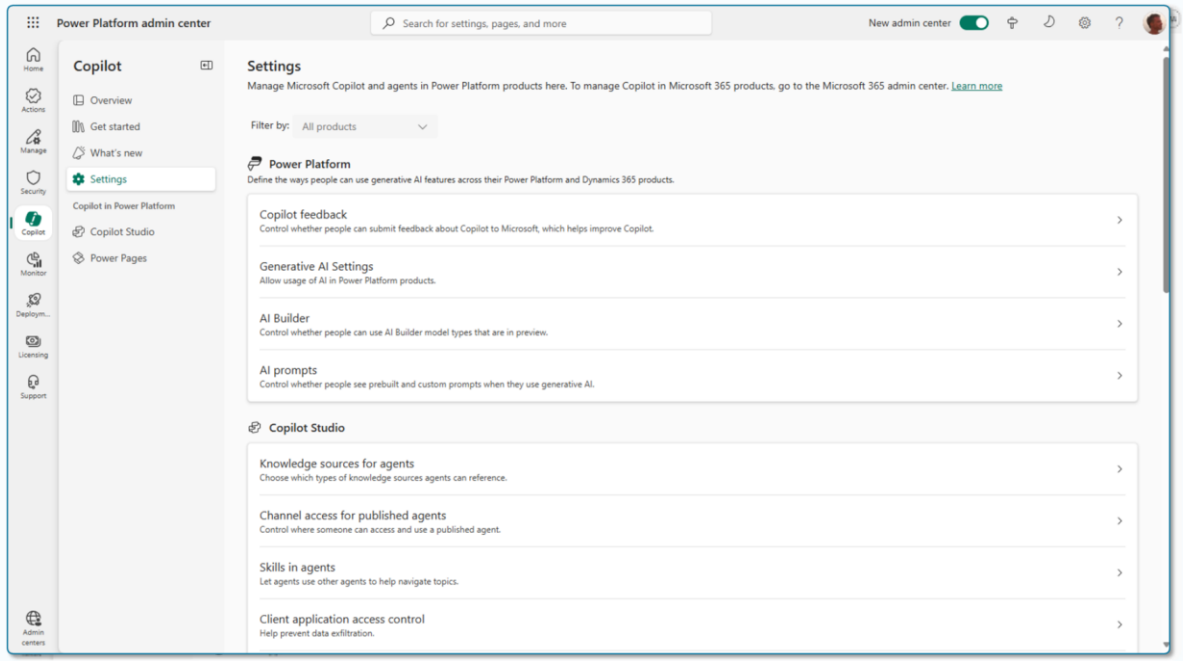
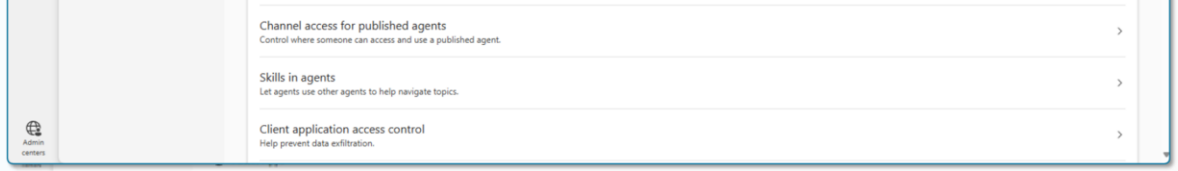


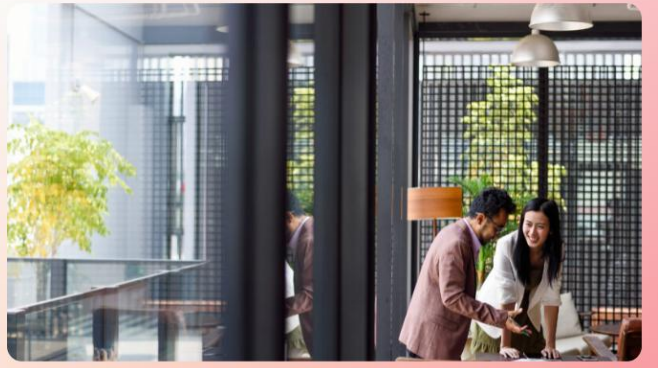


Start your Copilot hub journey

Whether you're just beginning to explore the possibilities of Copilot and Copilot Studio agents or you're ready to take your AI adoption to the next level, Copilot hub is your trusted command center. From actionable usage insights and robust governance to learning resources, it's designed to help you maximize the potential of Copilot and Copilot Studio agents—securely, responsibly, and with confidence. Learn more about the new capabilities here. Be sure to click on the 'New admin center' toggle in the upper right corner to see the new experience.

What's next for Copilot hub?

We will soon be introducing a **Power Apps** product page for admins to monitor usage analytics for both the *data entry agent* and the *data exploration agent*. This experience will include analytics like monthly active users, action counts, and drill-down views. Be on the lookout for an announcement when this releases. Continue to expect enhancements – from richer analytics and reporting to supporting more Copilot and Copilot Studio agent scenarios. Try the new Copilot hub today and make the most of your Power Platform Copilot journey!



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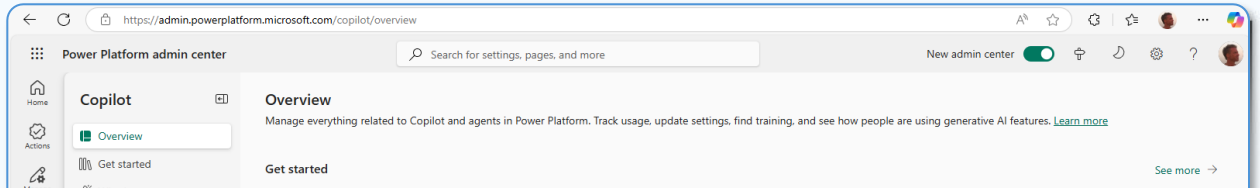
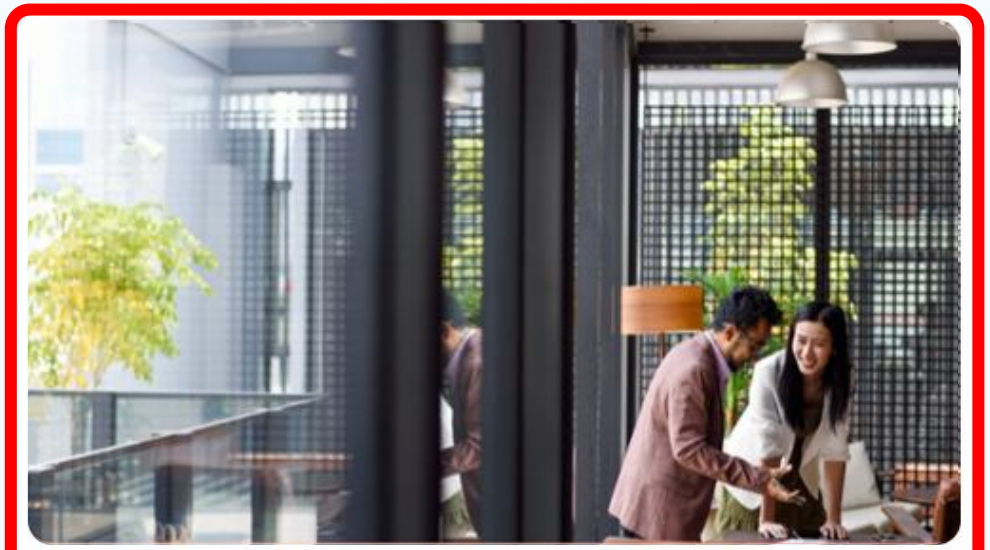
Unifying insights, governance, and AI-driven productivity for the modern enterprise

We're excited to announce the new Copilot Hub experience in the Power Platform Admin Center, unveiled at Microsoft Build, which brings a host of improvements based on your feedback. This updated experience provides Power Platform and environment admins with a central place for Copilot management – offering **greater transparency** on upcoming features, **deeper usage and cost insights**, and **unified settings** for easier governance. Best of all, it's live now for you to try out. Simply head to the Power Platform admin center, select the 'New admin center' toggle in the upper right corner, and click on Copilot in the left navigation to explore the new capabilities.



Management and governance



June 12 · 4 min read

Experience the redesigned Copilot hub ›

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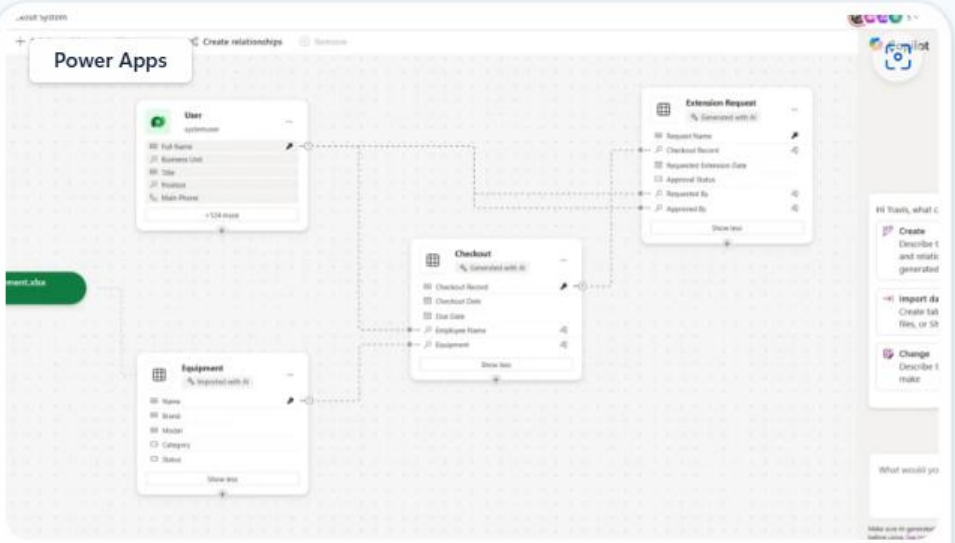


June 9 · 9 min read

What's new in Power Apps: May 2025 Feature Update ›

Build 2025 Sessions We had a great set of sessions at Microsoft Build, you can watch the recordings on demand to catch up! AI-powered Development Check out what's new in this month's Power Apps Pulse! Make plans for your existing solutions, import data from multiple worksheets in an Excel workbook, get rich AI-powered summaries of [...]

View all management and governance

Operations

Power Platform

June 16 · 8 min read

Data Agent Architecture powered by Microsoft Dataverse ›

Turning Hidden Data into Actionable Insights: Why Manual Processes Are Failing Your Business In every organization, data fuels critical business processes.

Power Apps

```
Status( Feature:Text ):Text =
 Switch( Feature,
  "ECP", "Generally Available",
  "UDF", "Preview", // GA Soon!
  "UDT", "Experimental" );
```

June 18 · 2 min read

Enhanced Component Properties, User Defined Functions, and UntypedObjects on the move ›

Taking another big step forward, Enhanced Component Properties (ECP) are now generally available (GA) and ready for your production workloads! ECPs are a great way to modularize and reuse your logic across an app, with the added bonus that ECPs can be shared across apps through a component library.

Copilot Studio

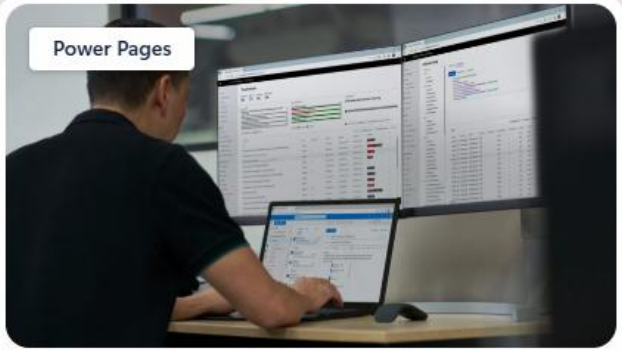
upwork + Microsoft Power Platform

June 16 · 1 min read

Empowering a New Era of Agent-Based Experiences: Upwork and Microsoft Power Platform Partnership ›

We are entering a new era of work—one where low code and agent-based experiences are reshaping how we create and collaborate.

Power Pages

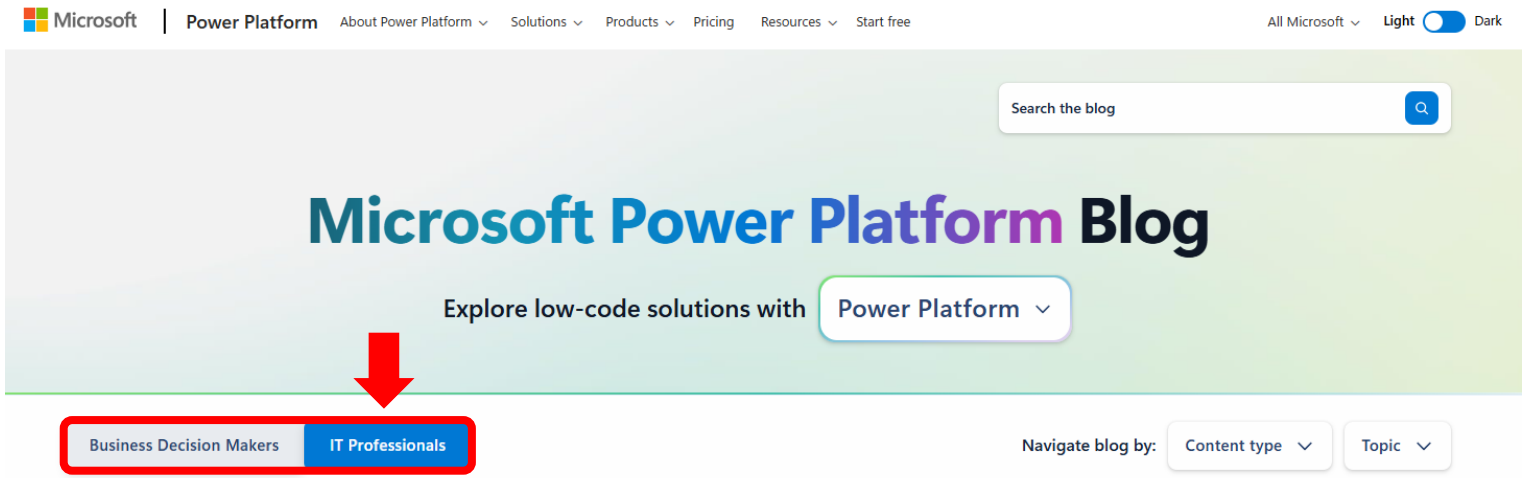


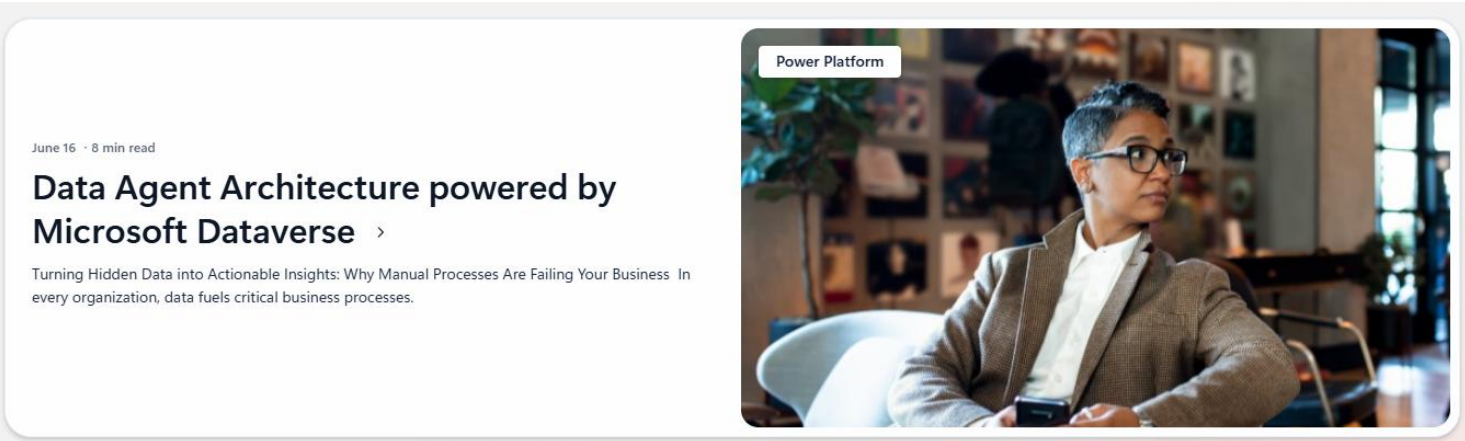
June 17 · 1 min read

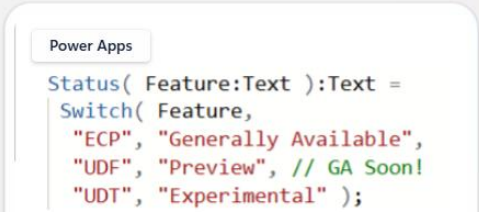
Enable Natural Language Search for Lists in Power Pages (Preview) ›

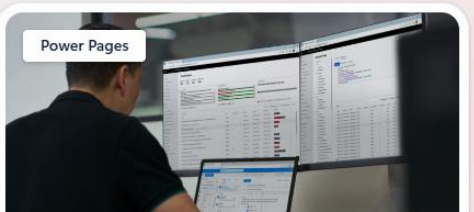
We're pleased to introduce a key usability enhancement for lists in Power Pages: Natural Language (NL) Search.

Microsoft Power Platform Blog > Experience the redesigned Copilot hub









Redesigned Copilot hub

Microsoft Power Platform Blog

> Experience the redesigned Copilot hub

YouTube: Copilot hub in Power Platform Admin Center

https://aka.ms/**beluxsmb**

Thank you!