Cloud Champion Series: 1st and 2nd of September

Robert Pufan

Partner Solution Architect

Microsoft Central Europe

September 1st – Microsoft 365 Copilot: Ready to use & Custom Agents 30 minutes

Michal Wypych

Partner Solution Architect

Microsoft Central Europe

September 2nd – Introduction to Copilot Studio 30 minutes

Microsoft

CLOUD CHAMPION

Cloud Champion Series: 1st of September

Microsoft 365 Copilot: Ready to use & Custom Agents in Agent Studio

Robert Pufan

Partner Solution Architect

Microsoft Central Europe

Microsoft

CLOUD CHAMPION

Agenda for today: September 1st

- What Is & Why Care: Microsoft 365 Copilot?
- How to control the source of truth with Agents?
- Demo of new Ready to Use Copilot Agents
- What is Copilot Studio – Agent Creator?
- Live demo Copilot Studio Agent Creator

Microsoft

Microsoft 365 Copilot
The AI Platform for Professionals

Control the Source of Truth with Agents

Robert Pufan

Partner Solution Architect

Microsoft Central Europe

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Microsoft

AI here. AI there. AI everywhere!

AI became a commodity.
You got Internet? You got AI!

Do we use it in a secure, compliant and productive way?

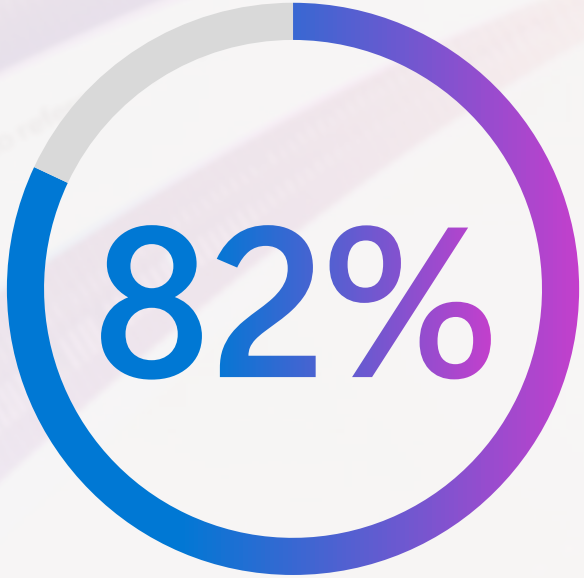
AI has quickly evolved from a futuristic concept to a practical, indispensable tool in everyday work

Statistics source: Microsoft, 2025 Work Trend Index Annual Report, April 23, 2025.

Human labor is reaching its limits

of the global workforce lack enough time or energy to do their work

of leaders say productivity must increase

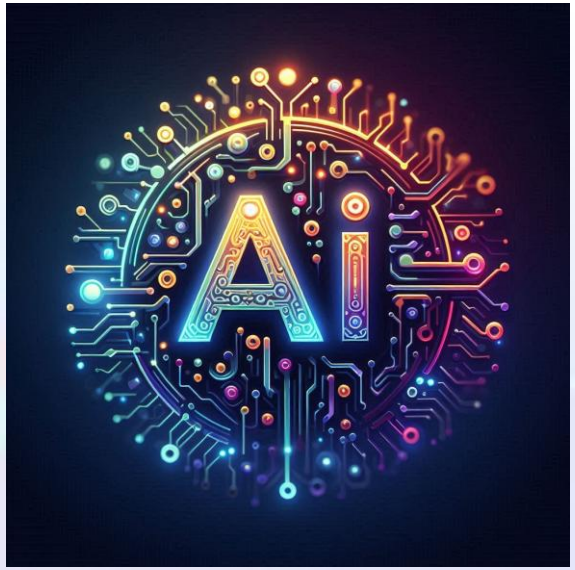


of leaders expect to use agents to meet the demand for more workforce capacity

[The Work Trend Index Annual Report 2025: The Year the Frontier Firm Is Born]

Microsoft

Generic / Consumer AI



Accessible with personal email

Professional AI Platform

Microsoft 365 Copilot

Microsoft

What is the difference between Microsoft 365 Copilot and other AI tools?

Microsoft 365 Copilot

Unlock productivity and unleash creativity

Natural Language

Large Language Models + Microsoft Graph - Your Data - + Microsoft 365 Apps + The Web

Microsoft 365 Copilot is the AI assistant you can trust

Security

Honors your existing permissions

Persistent label inheritance and DLP policies

Risk-based conditional access and endpoint management

Governance & Compliance

Ramp your data preparedness for AI

Detect and investigate non-compliant usage

Guided assistance to remain compliant with AI regulations

Privacy

You control your data

You control your data location

Your data isn't used to train foundation models

Your Microsoft 365 security, governance, compliance, and privacy policies

Microsoft

"Built on Microsoft's comprehensive approach to security, compliance and privacy.

Copilot is integrated into Microsoft 365 and automatically inherits all your company's valuable security, compliance, and privacy policies and processes. Two-factor authentication, compliance boundaries, privacy protections, and more make Copilot the AI solution you can trust."

Source: Introducing Microsoft 365 Copilot – your copilot for work - The Official Microsoft Blog | 16th of March 2023

Microsoft

Microsoft 365 Copilot does not change any of the Microsoft 365 existing policies.

Source: Introducing Microsoft 365 Copilot – your copilot for work - The Official Microsoft Blog | 16th of March 2023

Microsoft is built on trust

1

Your data **is your data**

2

Your data **is not used** to train or enrich foundation AI models

3

Your data and AI models **are protected** at every step

4

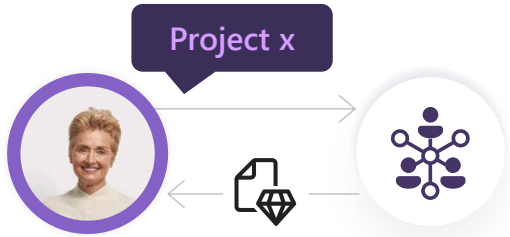
Our Customer Copyright **Commitment**

Security and compliance challenges

1

Data oversharing

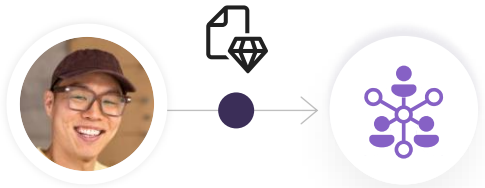
Users may access sensitive data via AI apps they're not authorized to view or edit



2

Data leak

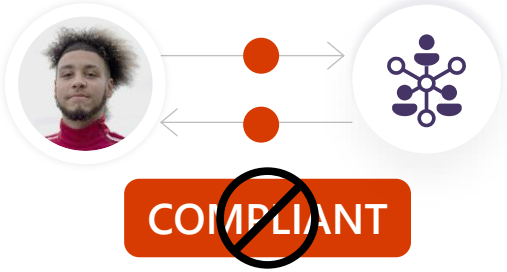
Users may inadvertently leak sensitive data to AI apps



3

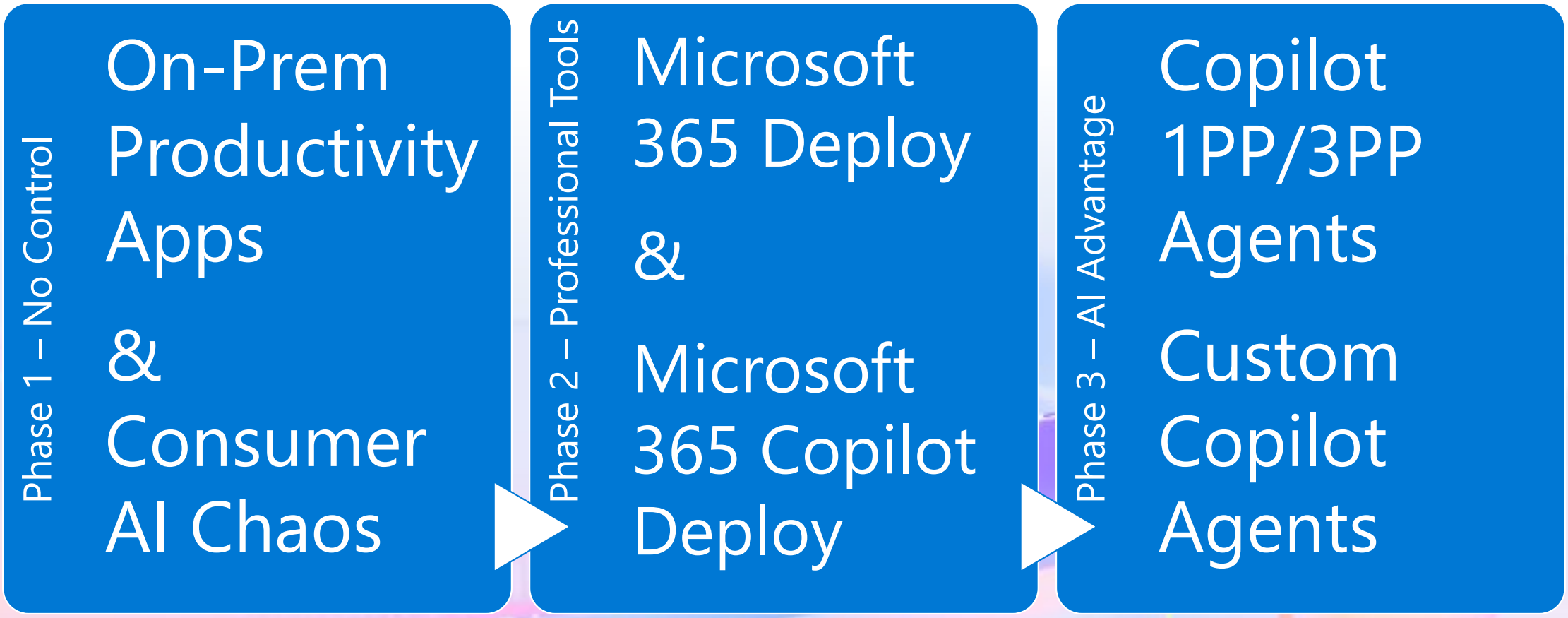
Non-compliance usage

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



Microsoft

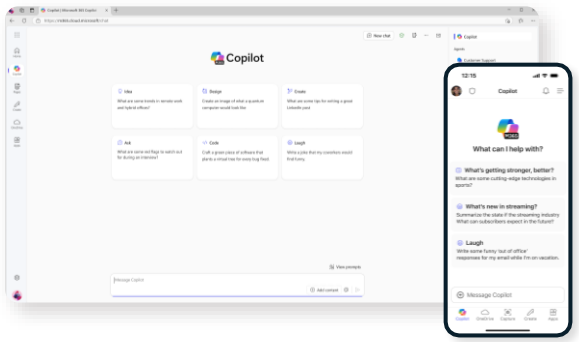
Where is the Market?



Microsoft

Solutions? We got it!

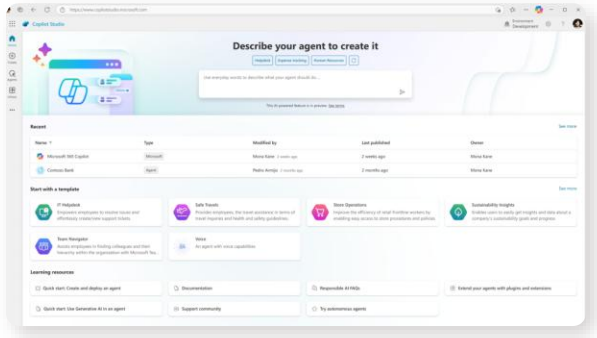
Microsoft 365 Copilot Chat



Chat

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

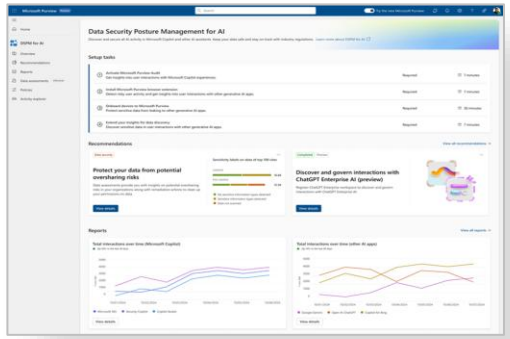
+



Agents

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

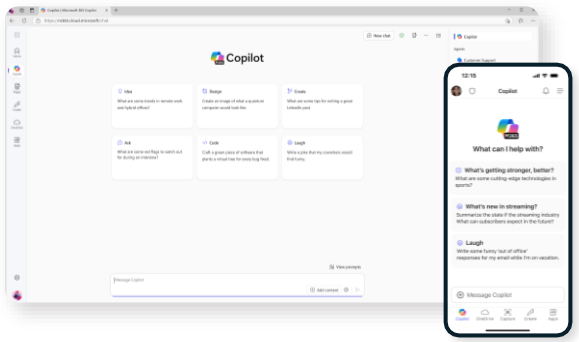
+



IT Controls

Enterprise Data Protection
and agent management

Microsoft 365 Copilot Chat



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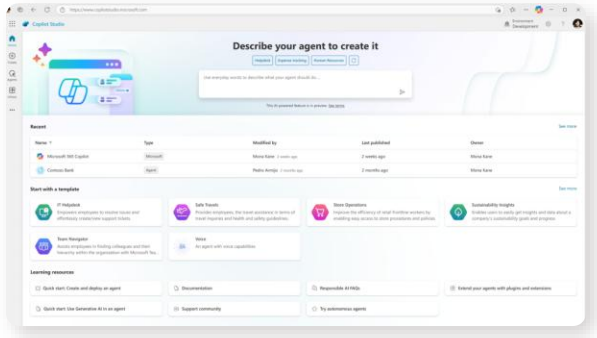

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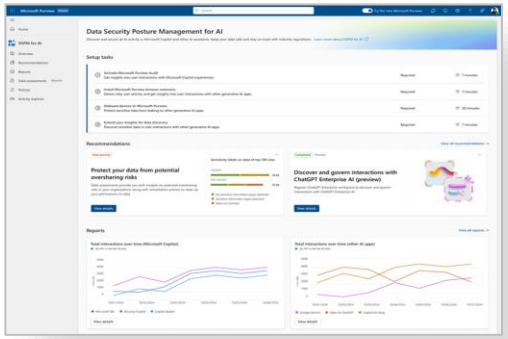
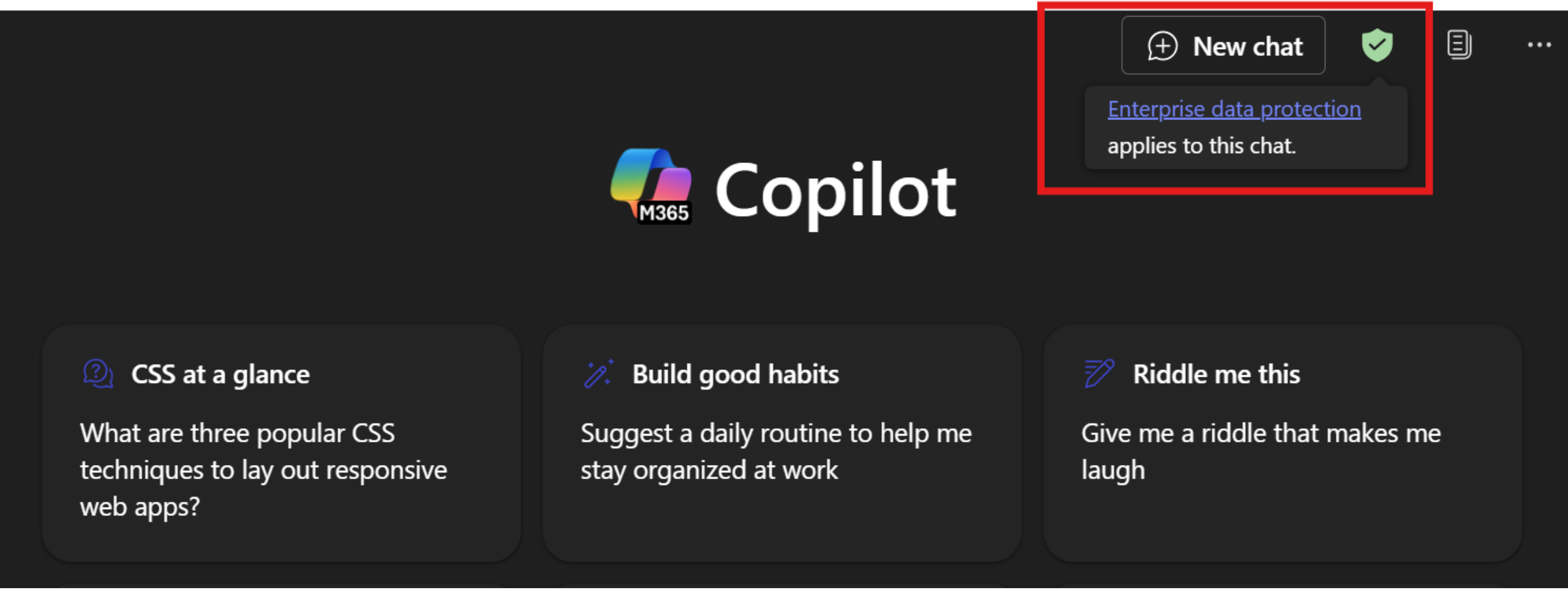


IT Controls

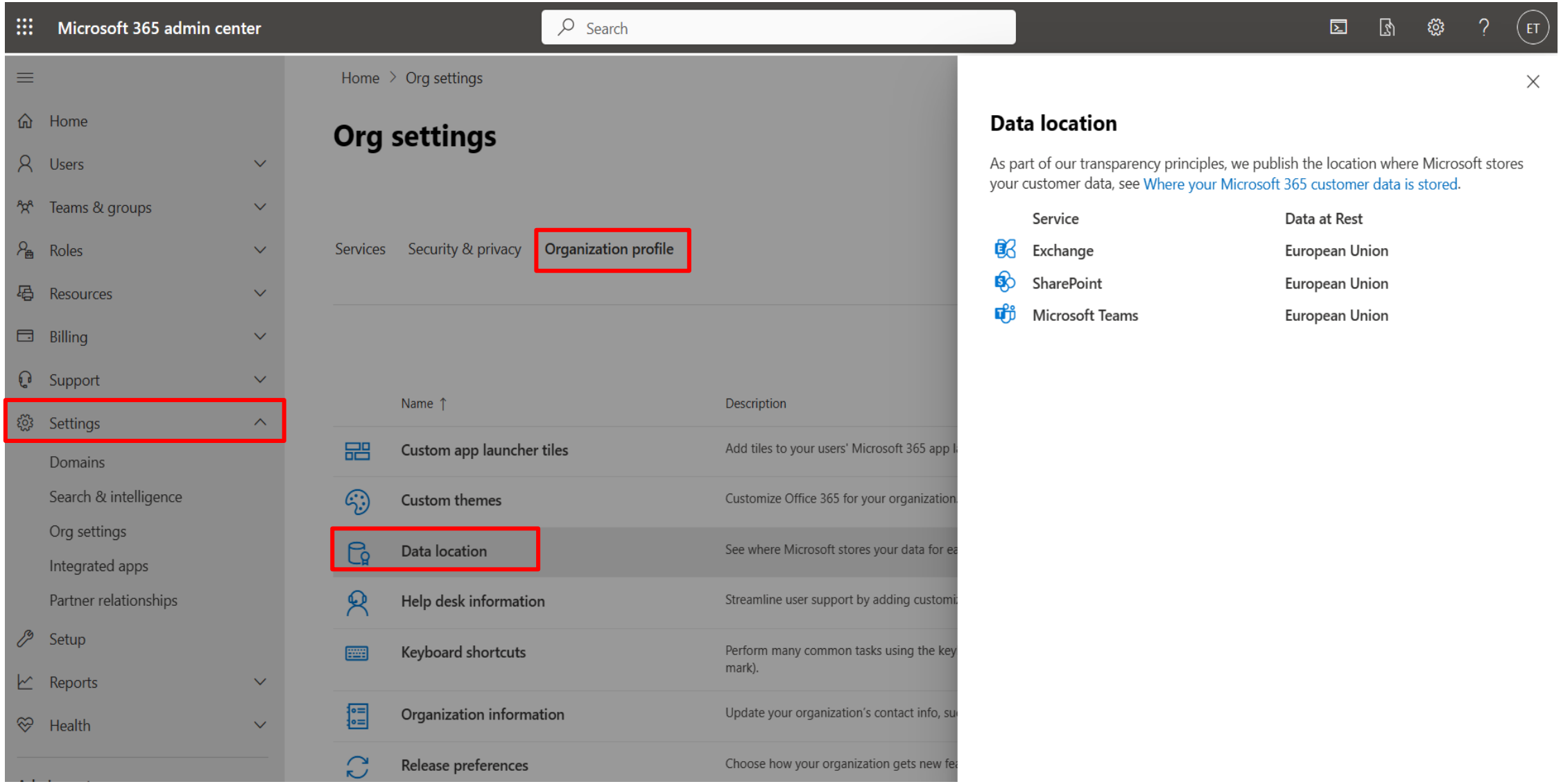
Enterprise Data Protection and agent management



Work Data? Use your Work Account!

Enterprise Data Protection

Data Location in Microsoft 365 Admin Center (MAC)



Microsoft

What about when Copilot is not enough?

Answer: We extend it!

Microsoft

Microsoft 365 Copilot Extensibility

Copilot Studio & Copilot Agents

Copilot

Human augmentation

Private, Personal Assistant

Every employee will have a Copilot

Agents

Connected to Copilot or autonomous

Automates tasks and processes

Every business process will have an agent

UI for AI

Platform for AI makers

Copilot

Agents

What are agents?

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

Agents vary complexity and capabilities depending on your need

Microsoft

Microsoft 365 Copilot Extensibility

Ready to Use Agents from Top Software Providers

Redefine work processes with Copilot Agents

Already available Copilot Agents in store OR build your OWN agent for Copilot

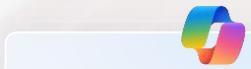
AISERA — Boost productivity with domain-specific LLMs and automate workflows	Harvey. — Offer legal assistance, analysis, and drafting for legal and professional services users	PRIORITY MATRIX — Align teams on shared goals for onboarding, support, and post-sale upsell
Bigtincan™ — Enable sales teams to quickly find documents and summarize for more effective meetings	lumapps — Enable employees to understand company goals, streamline their work, and grow	Seismic — Search and summarize content to help win customers
Copilot for Finance — Transform the way finance works and accelerate time to business impact	Meltwater — Provide timely marketing insights	Templafy — Help protect your brand and quickly create compliant high-value business document
Copilot for Sales — Help sellers maximize their sales productivity	monday.com — Use AI for effortless, more efficient work cross-platform	UiPath® — Automate end-to-end enterprise workflows within Copilot conversations
Copilot for Service — Enhance service experiences and boost agent productivity	Moveworks — Give employees easier access to information they need and take actions across enterprise systems	VANTAGECIRCLE — Promote employee recognition by identifying and acknowledging key behaviors
freshworks — Provide rapid, personalized support to handle employee issues with tailored conversations	Mural — Find and summarize murals and templates to save time and improve collaboration	Zoho Desk — Enable customers to manage IT tickets and resolve queries faster

Microsoft

Microsoft 365 Copilot Extensibility

Ready to Use Agents included in Microsoft 365

Agents in Microsoft 365



Researcher

Generally available

Analyst

Generally available

Skills

Frontier

Facilitator

Public preview

Interpreter

Generally Available

Project Manager

Public preview

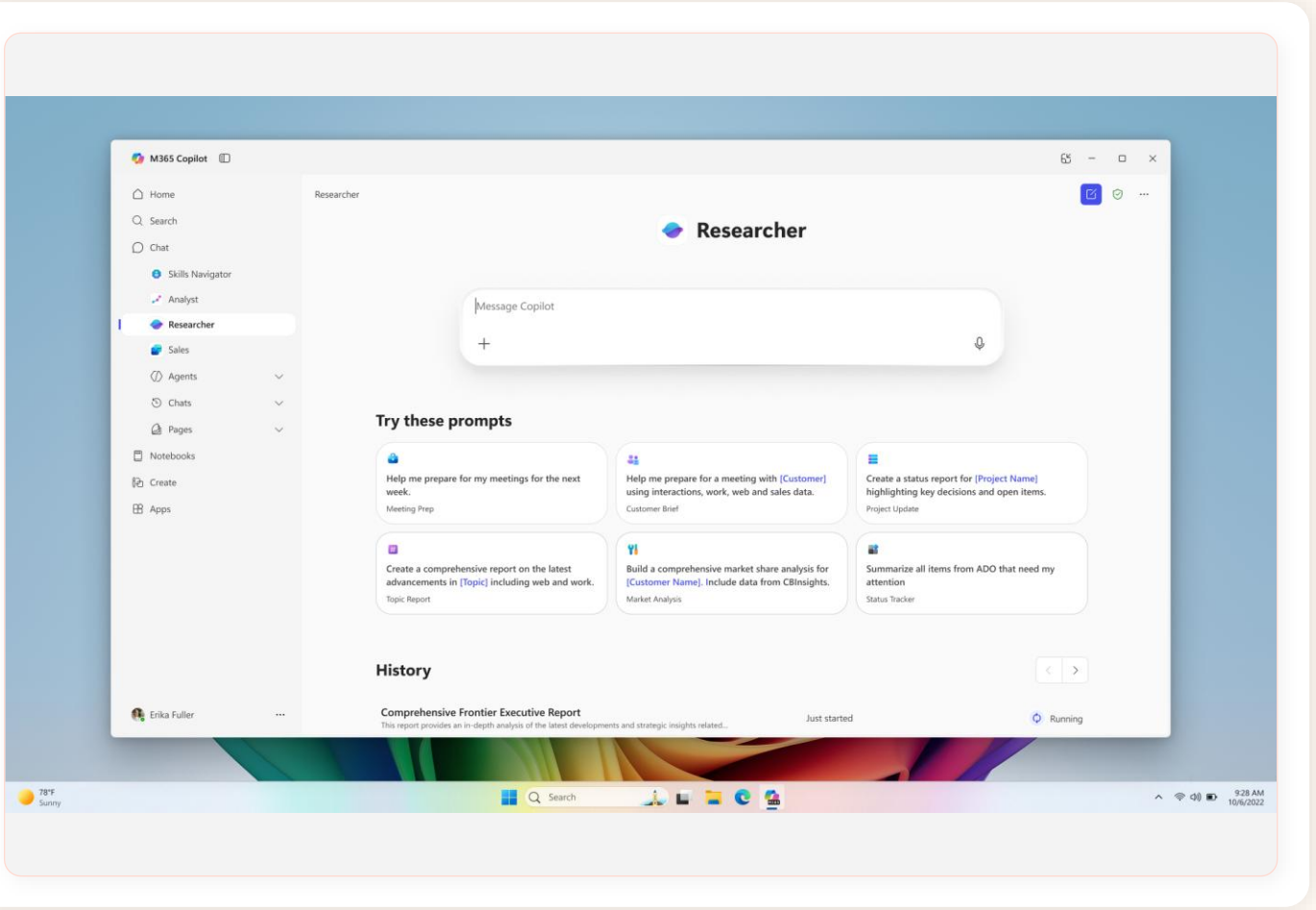
Researcher

Copilot Chat

Researcher

- **The Researcher agent** gives organizations the capability they'd expect from a highly paid strategist or researcher
- Combines the most advanced deep reasoning models with Copilot Chat's web- and work-grounding, as well as its agent ecosystem,
- **Provides** well-reasoned responses to complex prompts with the data that matters most.
- Gives users **a thought partner** that can perform advanced reasoning grounded in their unique context
- Gives organizations **on-demand access** to the types of work they typically expect from highly paid employees

Generally available



Researcher Demo

Where can you use Researcher

- Researcher is accessible in the Microsoft 365 Copilot app on the on the left rail under ‘agents’.

Turning on Researcher

- Researcher can be accessed via the Microsoft 365 Copilot app.
- Customers can also access Researcher by @mentioning the agent in Copilot Chat.

How to use Researcher

- Once you enter a prompt, Researcher will ask clarifying questions and uses your responses to move forward with the task.
- You’ll see Researcher’s chain of thought reasoning and sources.
- Researcher will share a thorough response and output based on your prompt that you can edit and collaborate with your team on in Pages.

Researcher: A reasoning agent in Microsoft 365 Copilot - VIDEO

When to use Researcher agent

When to use Researcher

- Strategic insights, competitive analysis, or deep research grounded in internal + external data
- When you need to complete complex, multi-step research across internal work data and/or public web data

Use Cases

- Strategic market analysis
- Identifying growth opportunities
- Synthesizing internal and external insights
- Generating executive summaries with citations
- Preparation for high-stakes meetings

Best Practices for using Researcher

- Once you enter a prompt, respond to Researcher's clarifying questions to guide it in the right direction.
- Read through Researcher's chain of thought reasoning and sources to understand how it leveraged available data to respond to your request.
- Turn Researcher's response into a working, living document by adding the response to a page, then editing and adding to it with your team.

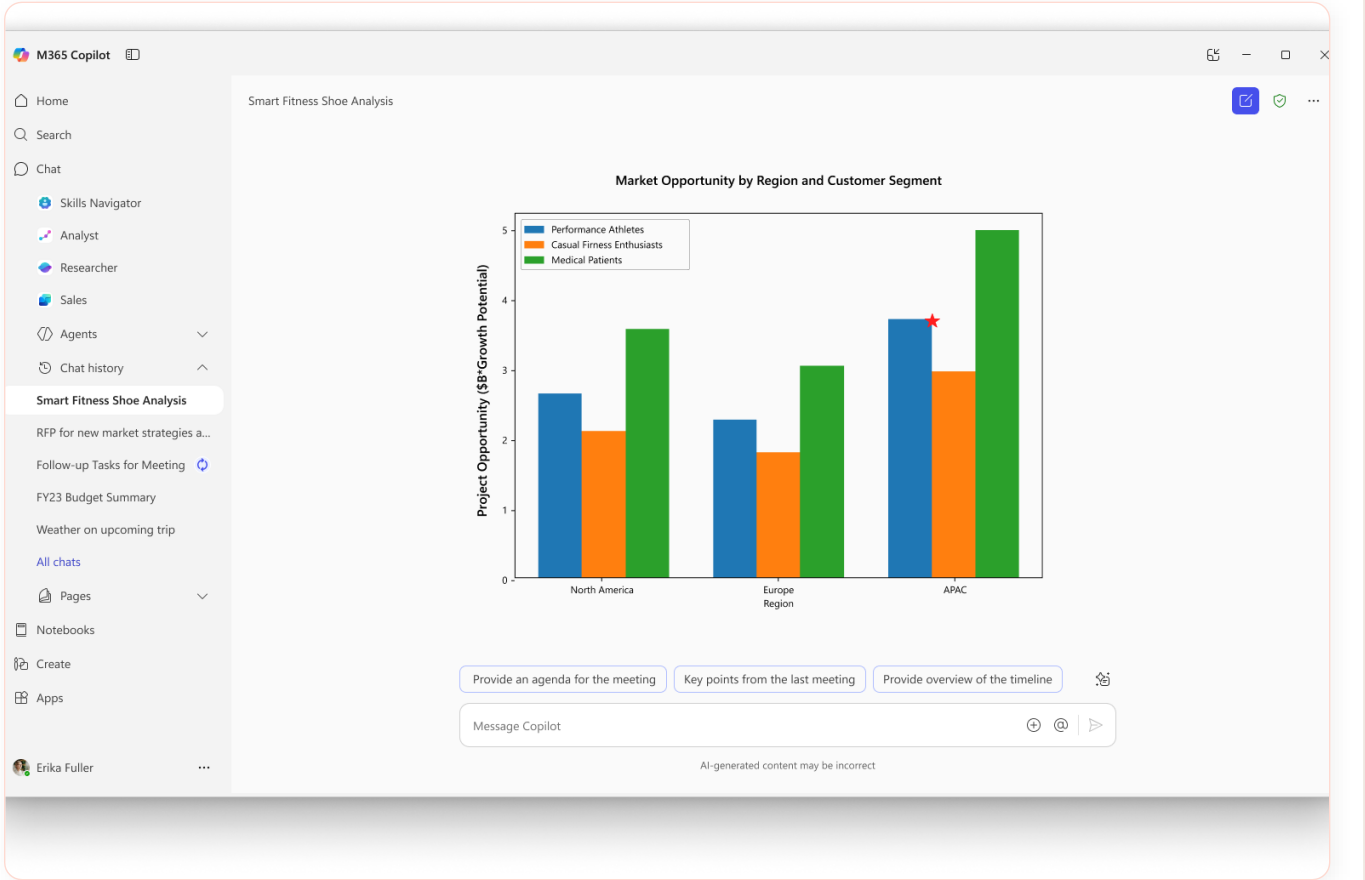
Analyst

Copilot Chat

Analyst

- Analyst thinks like a skilled data scientist, so you can go from raw data to insights in minutes.
- Built on OpenAI's o3-mini reasoning model and optimized to do advanced data analysis at work
- Analyst uses chain-of-thought reasoning to progress through problems iteratively, to refine its reasoning and provide a high-quality answer
- Runs Python to tackle your most complex data queries— you can view the code it's running in real time to check its work

Generally available



Analyst Demo

Where can you use Analyst

- Analyst is accessible as an agent in Copilot Chat in the Microsoft 365 Copilot app, Teams, and Outlook.

Turning on Analyst

- The agent will appear in the Agent Store under 'Built by Microsoft' located within the 'All agents' and 'Get agents' landing page.
- For users with a Microsoft 365 Copilot license, Researcher and Analyst agents will be pre-pinned for all eligible users.

How to use Analyst

- Find the file(s) with the raw data you need help analyzing and add it to your prompt in Copilot Chat, either by uploading directly or selecting from your M365 files.
- Analyst currently supports up to 5 files at once across multiple formats including documents (Word, PPT, PDF) and datasets (Excel, CSV, JSON).
- Ask Analyst to provide the insights you're looking for, including specifying the type of visualization or graph.
- Analyst will understand the data, construct a plan, and execute Python code to reason over your prompt.
- This process may take a few minutes and you can follow along with chain-of-thought reasoning to check its work.

[Analyst: A reasoning agent in Microsoft 365 Copilot - VIDEO]

When to use Analyst agent

When to use Analyst

- When you need to analyze complex datasets, generate insights, or visualize trends across data

Use Cases

- Financial performance analysis and forecasting
- Customer segmentation analysis
- Sentiment analysis over survey or feedback data
- Data storytelling with visualizations

Best Practices for using Analyst

- Upload both structured (Excel, CSV, JSON, etc.) and unstructured (PDF, Word, PowerPoint etc.) data files, up to 5 files at once
- Ask complex, multi-variable questions that require advanced data analysis
- Specify the type of insight or visualization needed
- Review chain-of-thought and Python generated insights for accuracy

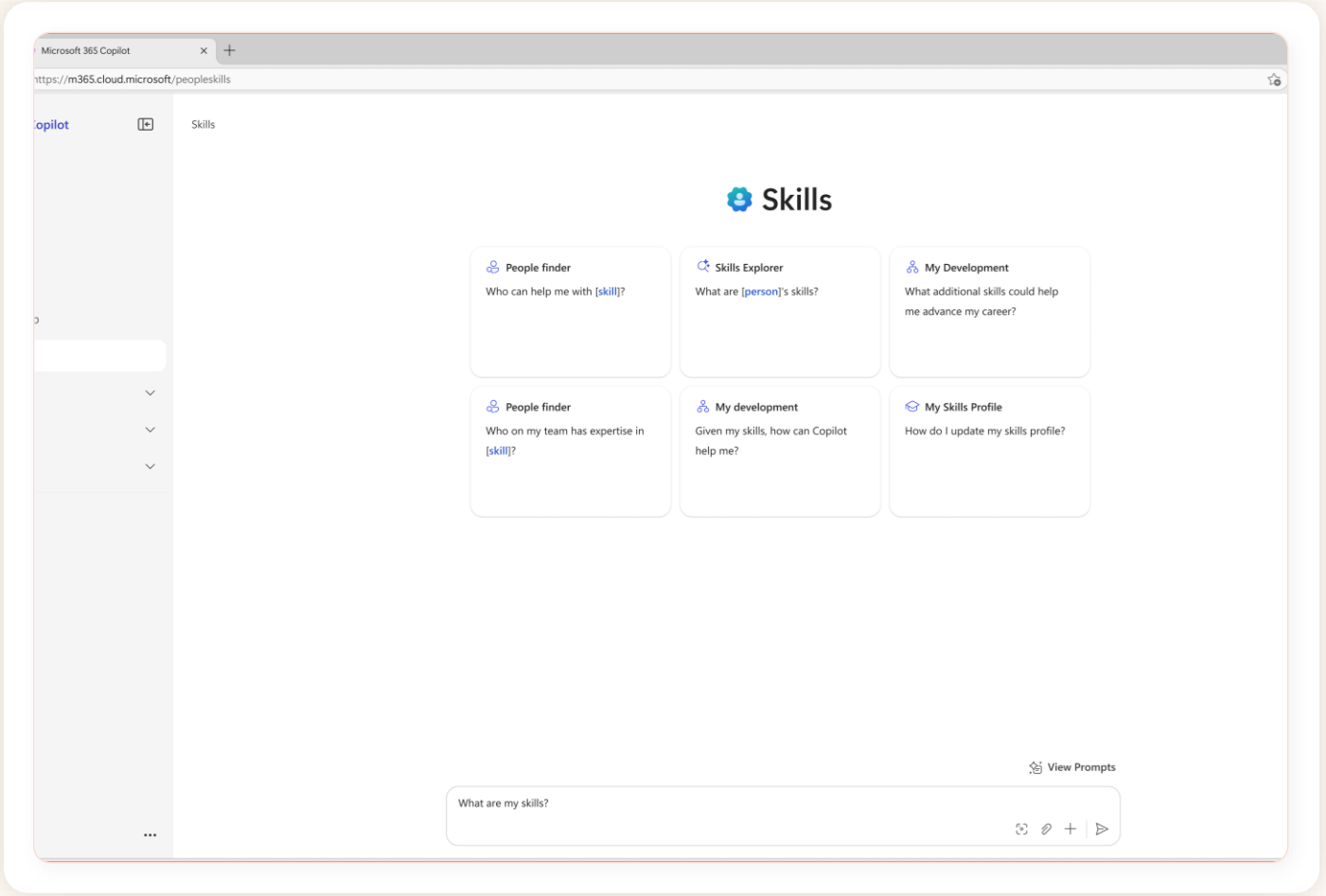
Skills

Copilot Chat

Skills agent

- Powered by People Skills – an **intelligent data layer** in Microsoft 365 Copilot that infers individual's skillsets derived from user activity such as meetings, documents, chat, search, and other signals
- Enables employees to easily find experts in the organization, understand colleague's skillsets, edit their own skill profiles, and make informed decisions about skill development
- **Inform strategic workforce** decisions with an up-to-date view of talent landscape strengths, gaps, and opportunities.

Coming to Frontier



Skills Demo

Where can you use Skills agent

- Skills agent is accessible in Copilot Chat

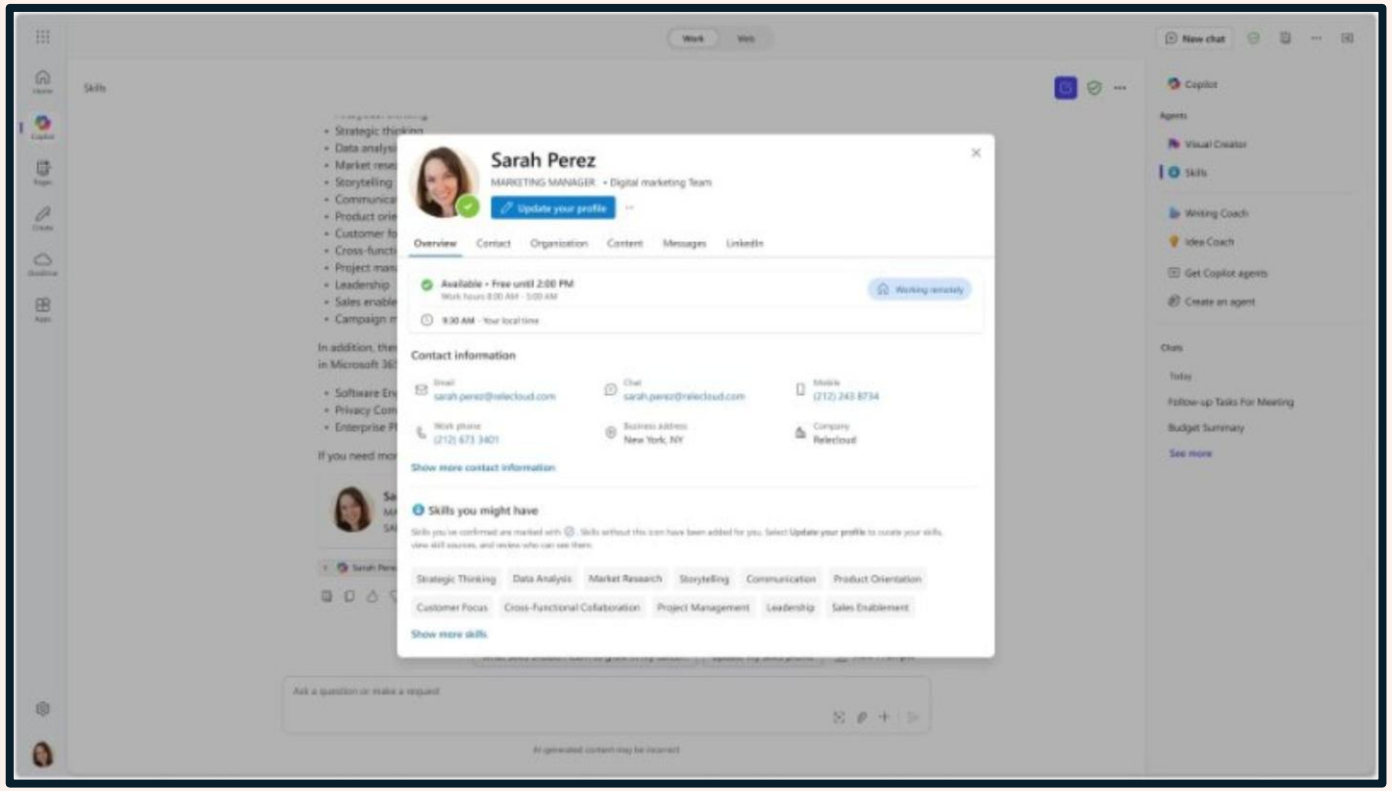
Turning on Skills agent

- Skills agent is accessible via Copilot Chat via the right-hand side panel or by @mentioning Skills

Skills capabilities:

- Validate AI-inferred skills or manually edit and update your M365 profile based on your expertise and activities
- Easily locate colleagues with specific expertise within the organization
- Enhance your learning experience with AI-powered recommendations based on skills you want to grow
- For leaders, facilitate project assignments based on skillsets

[People Skills in Microsoft 365 Copilot - VIDEO]



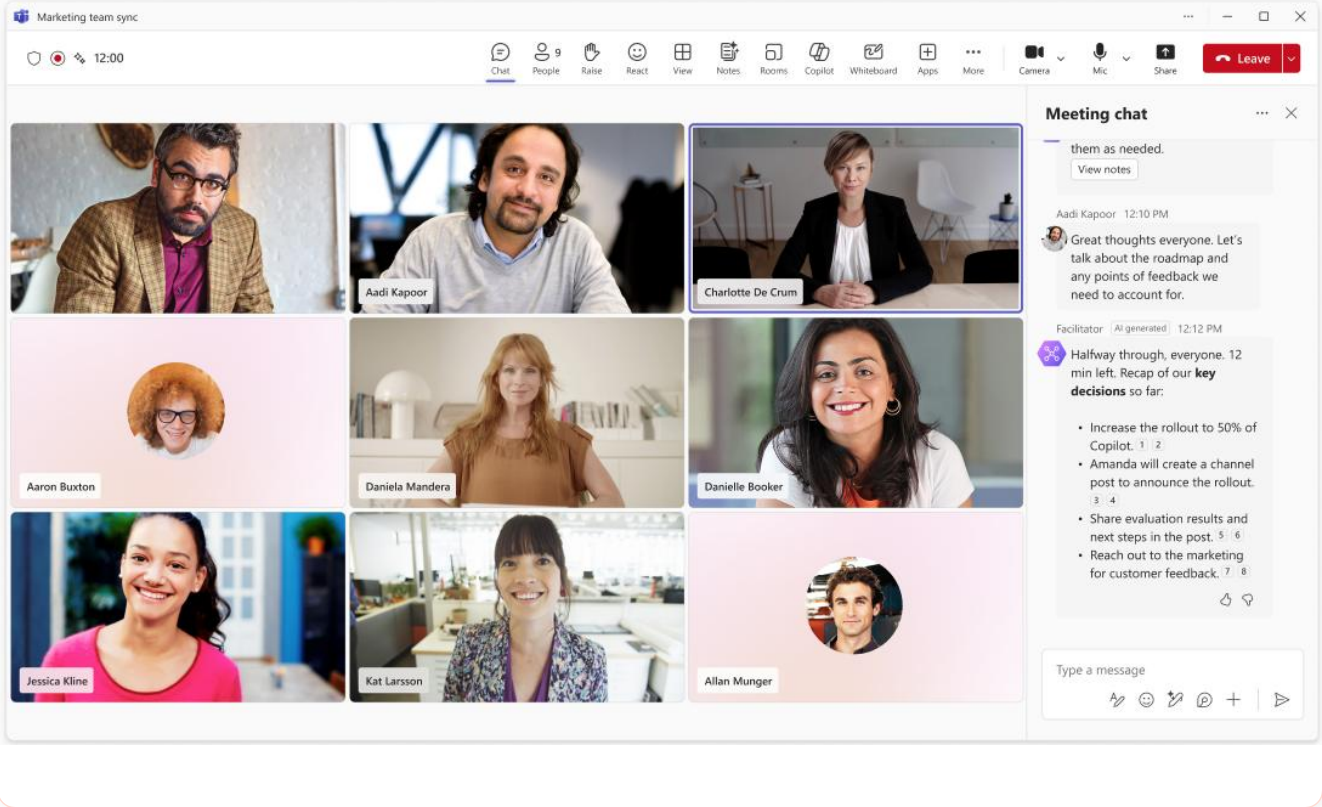
Facilitator

Teams meetings

Facilitator

- **Works alongside you and your team in Teams meetings**
- Takes **real-time notes**, allowing everyone to easily co-author.
- Helps **moderate meetings** by leveraging the set agenda or goal, checking in midway, and before wrapping up to recap key decisions made and open items.
- **@ mention** Facilitator in the meeting chat to get summarized insights from the conversation or search the web for information

Available now in public preview



Facilitator Demo

Where can you use Facilitator

- Facilitator works within Teams meetings to enable more effective collaboration.

Turning on Facilitator

- When scheduling the meeting in Teams under the “meeting options” section.
- During the meeting in the ‘More’ menu select “Turn on Facilitator.”

Engagement

- View and edit real-time meeting notes in the “Notes” tab.
- Facilitator proactively checks in the midway point and before wrapping to recap key decisions and open items in the meeting chat.

Facilitator in Teams meetings - VIDEO

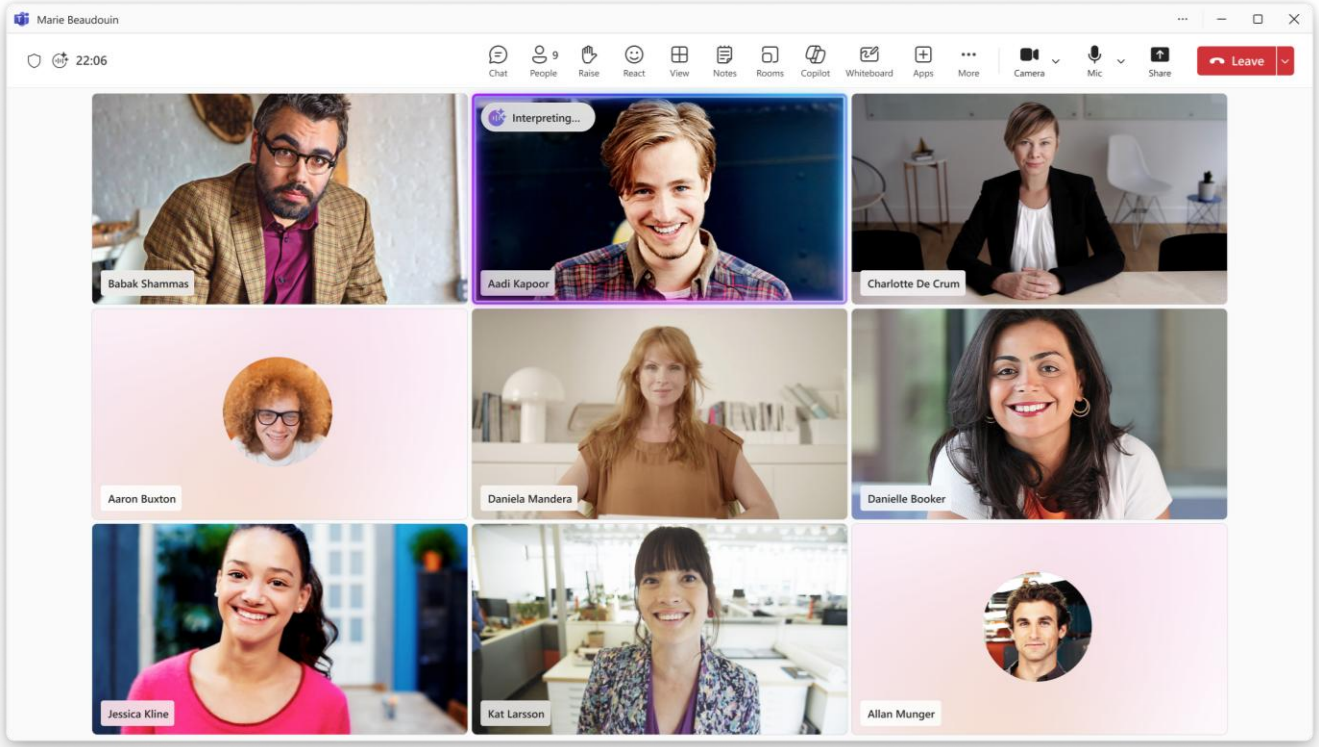
Interpreter

Teams meetings

Interpreter

- Enables real-time speech-to-speech interpretation in Teams meetings so each participant can speak and listen in the language of their choice
- Supports nine languages for interpretation

Generally Available



Interpreter Demo

Where can you use Interpreter

- Available during scheduled or channels Teams meetings.
- Use Interpreter during meetings that are more structured, with one person speaking at a time for longer durations.

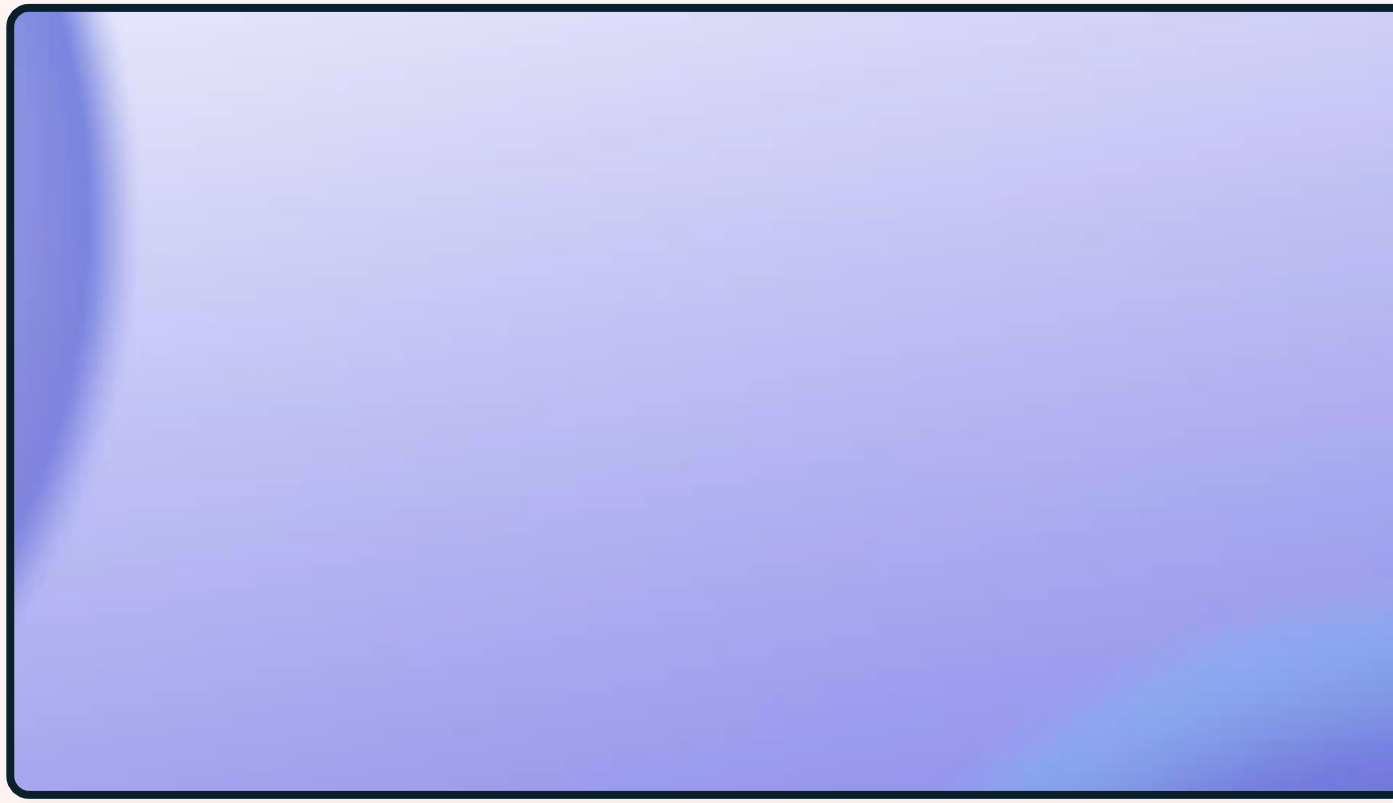
Turning on Interpreter

- Users can turn on Interpreter from the meeting options settings.
- Interpreter supports **9 languages**: English, Japanese, French, Spanish, Portuguese, Mandarin, Italian, German, Korean.

Settings

- Set your preferred language to listen to the meeting in.
- Choose to simulate your voice or use a preset voice option.
- Adjust volume settings as needed to balance between the original and interpreted audio.

Interpreter in Teams meetings - VIDEO



Support for calls (VoIP, PSTN), town halls, or Teams Rooms is not currently available.

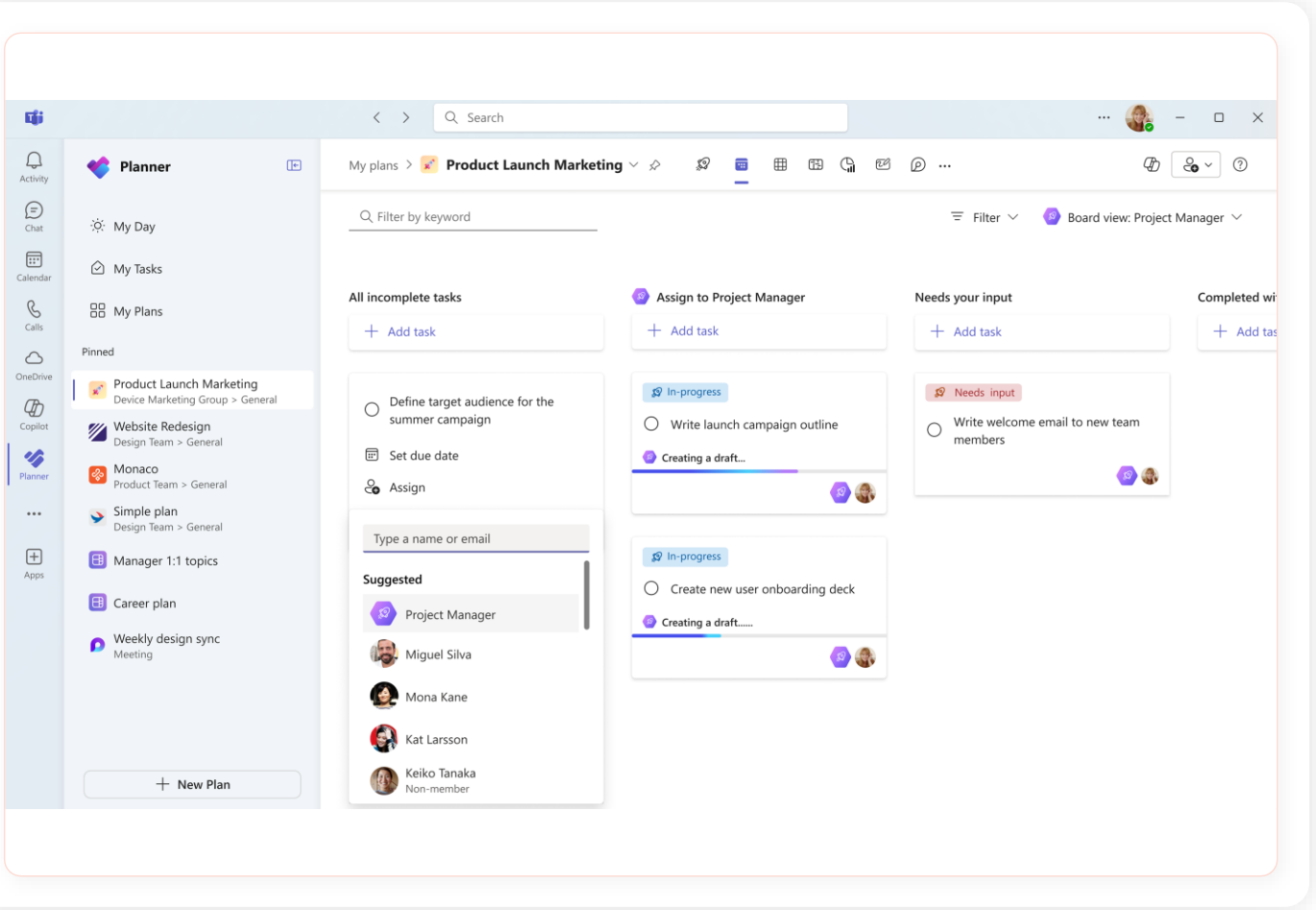
Project Manager

Planner

Project Manager

- **Create** new plans by inputting goals and generating tasks
- Assign tasks to the agent to complete with **progress tracking**
- Generate **status reports** for any project

Available in public preview



Project Manager Demo

Where can you use Project Manager

- Available within Microsoft Planner in Teams

Planning with Project Manager

- When creating a new plan, select "+ New plan" at the bottom left of the page. From there, select "Plan with Project Manager" or start from one of the Project Manager agent templates.

Agent capabilities

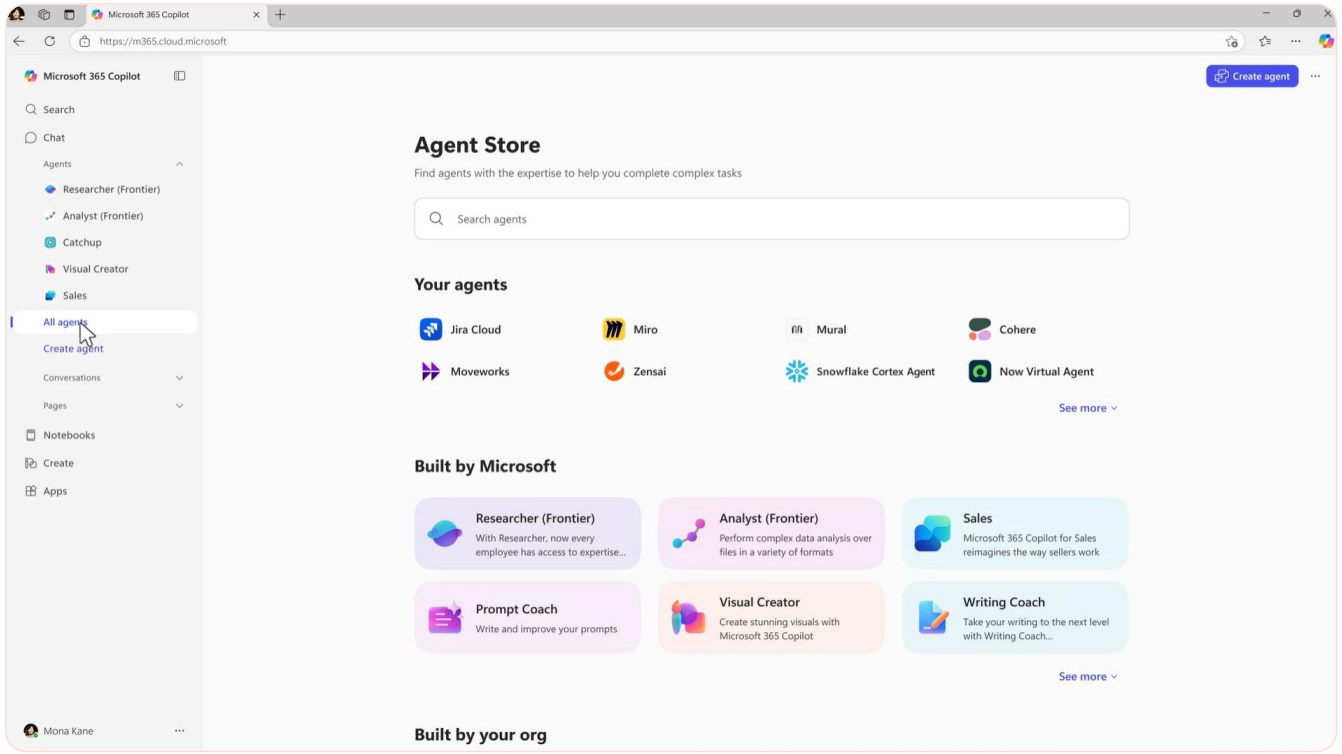
- Tracks progress of projects, and provides updates
- Sends notifications and reminders to the team
- Attempts any task it is assigned including generating document drafts
- Creates status reports for the team and stakeholders

Project Manager in Planner Demo - VIDEO

Easily discover agents in the Agent Store

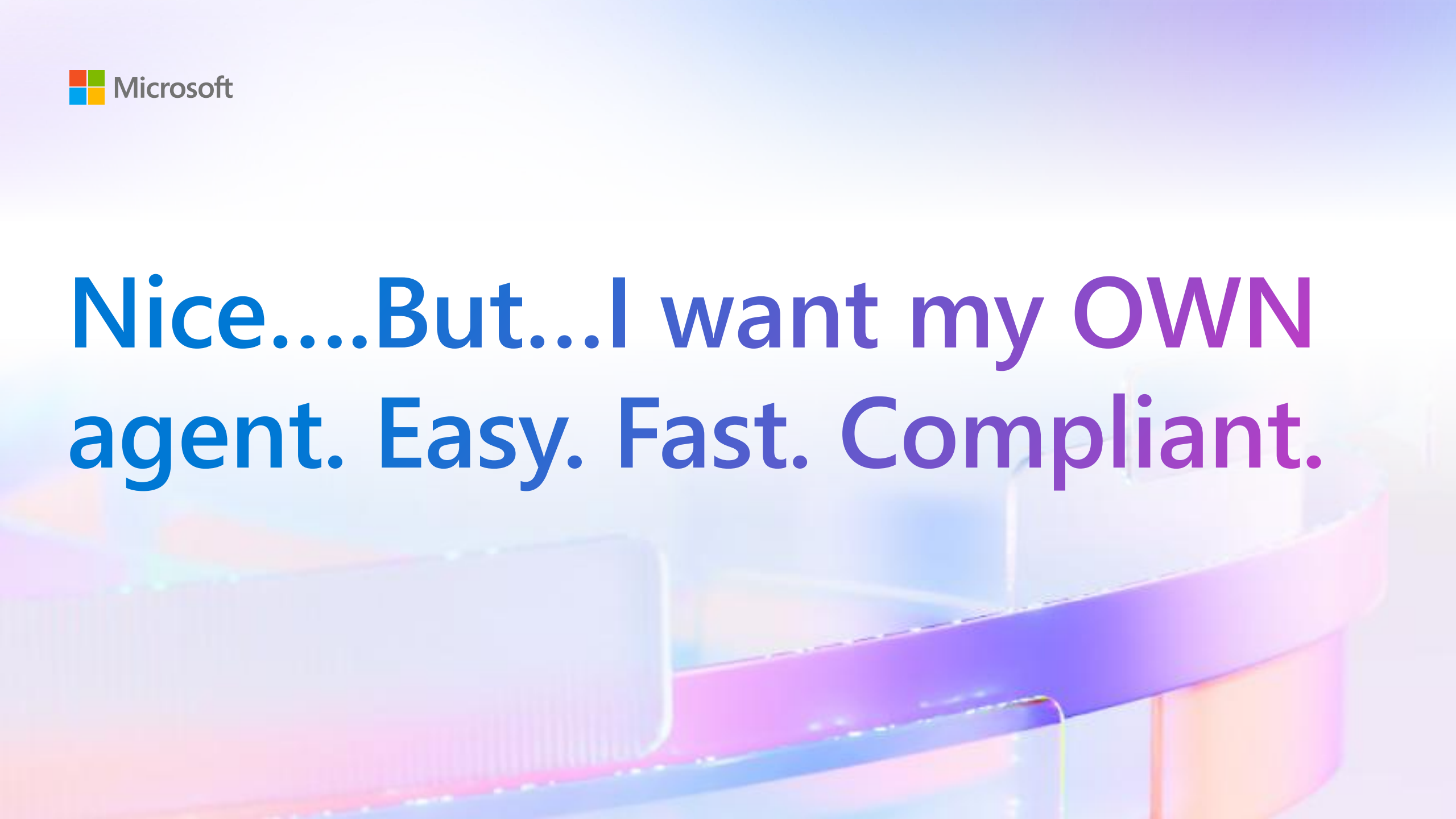
- **Agent Store** is an agent marketplace featuring agents from Microsoft, partners and customer organizations
- **Its immersive and personalized experience** helps you find and use agents to transform work processes and elevate productivity
- Share agents with colleagues via Copilot Chat or other Microsoft 365 Copilot endpoints to boost collaboration
- **IT admins have full visibility and control over how** agents **are** deployed in their organization

Note: Agents embedded in M365 apps are not available in the Agent Store



Microsoft

Nice….But…I want my OWN agent. Easy. Fast. Compliant.



Microsoft

Live Demo

Copilot Studio – Agent Builder

Please watch the video recording for this section.

Microsoft

Why Microsoft 365 Copilot?

Microsoft 365 Copilot Advantage

Your AI assistant for work

Integrated in the tools millions use every day

Word, Excel, PowerPoint, Outlook and Teams

Understands your work context

Trillions of signals in the Microsoft Graph deliver personalized and relevant responses

Extends to your business data

1400+ pre-built connectors to reason over your systems of record and line of business apps

Customize to make it your own

Create agents with your 1P or 3P data and apps using Copilot Studio

Enterprise-grade security, privacy, and compliance

Inherits Microsoft 365 security, permissions, policies, and admin controls. Built-in data governance with enterprise data protection. Responsible AI

Measure AI impact and business value

Tools to drive adoption and impact with Copilot Lab, Learning Academy and the Copilot Dashboard

Microsoft

Thank you!

Robert Pufan

Partner Solution Architect

Microsoft Central Europe

https://aka.ms/pufan

Microsoft

CLOUD CHAMPION

Don’t forget to join tomorrow, same time.

Next session

September 2nd – Your Introduction to Copilot Studio

Michal Wypych

Partner Solution Architect

Microsoft Central Europe

Thank you!

Microsoft 365 Copilot: Ready to use & Custom Agents in Agent Studio

Robert Pufan

Partner Solution Architect

Microsoft Central Europe