

Copilot Studio & Agents met Dynamics 365

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Agenda

M365 Copilot & Lowcode Agents

Buy or Build your own

Dynamics in an agentic world



Expanding the AI Opportunity

Personal productivity

Individual efficiency

Time savings

Increase creativity



Business value

Revenue growth

Cost optimization

Employee wellbeing



Microsoft 365 Copilot unlocks value and opportunity



Every employee
Universal tasks



Customer
Service



Sales



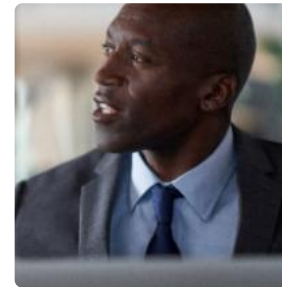
Finance



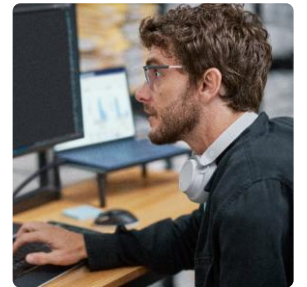
Marketing



HR



Legal



IT

Function-specific tasks

Key processes



Customer Service

Self-help

Support assignment

Issue diagnosis

Problem resolution

Continuous improvement



Sales

Customer self-service

Lead generation

Customer engagement

Negotiations & closing

Post-sale follow-up & upsell

Sales analysis & forecasting



Finance

Quote to cash

Record to report

Tax & treasury

Planning & analysis

Risk management and compliance

Procure-to-pay



Marketing

Customer insights & strategy

Demand generation

Content creation

Campaign execution

Predictive analysis

Personalization

Sales enablement & recommendation



HR

Employee engagement

Recruiting

HR admin & payroll

Compensation & benefits

Learning & development

Talent management

HR strategy & planning



Legal

Regulatory & compliance management

Contracting

Risk management

Litigation

Consultation

Intellectual property

Advisory services



IT

Data management

Software management & acquisition

Device management

IT operations

Network operations

Information security

Change management & user adoption

The AI Adoption Curve



Access

Provide broad access to AI within budget constraints



ROI

Redesign business process to realize value of AI

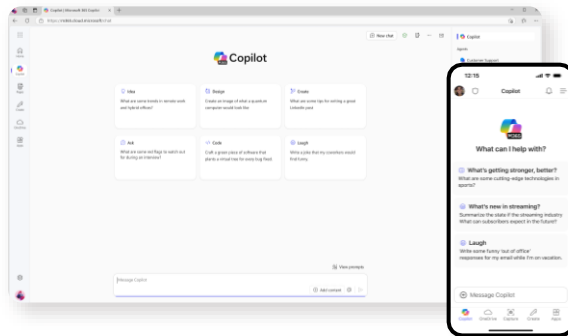


Governance

Deliver secure and compliant AI while managing agents



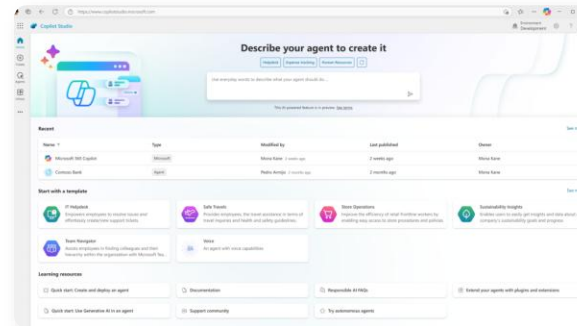
Microsoft 365 Copilot Chat



Chat

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

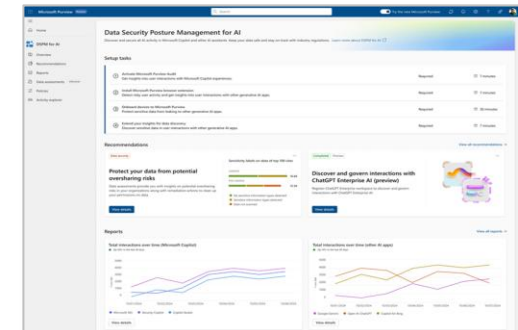
+



Agents

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

+



IT Controls

Enterprise Data Protection
and agent management



← **Adoption and measurement** →
Copilot Control System



← Adoption and measurement →
Copilot Control System



Microsoft 365 Copilot

Your AI assistant for work

\$30

Copilot Chat

Free, secure AI chat



Chat

Work-grounded

Copilot in M365 apps

Teams, Outlook, Word, Excel, PowerPoint

Agents

Copilot Control System

Copilot Analytics



Copilot

Human augmentation

Works as your personal assistant

There are only as many Copilots as
there are people



Agents

Expert systems that can work autonomously

Works on behalf of a process or company

There are more agents than people

What is an agent?

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

Deploy to...



Microsoft Copilot



Your applications



Your websites

Out-of-the-Box Agents

Streamline business processes seamlessly across Microsoft 365 apps



Analyst agent



Researcher



Facilitator



Sales agent



Employee Self-Service



Sales chat



Interpreter



SharePoint agents



Project Manager

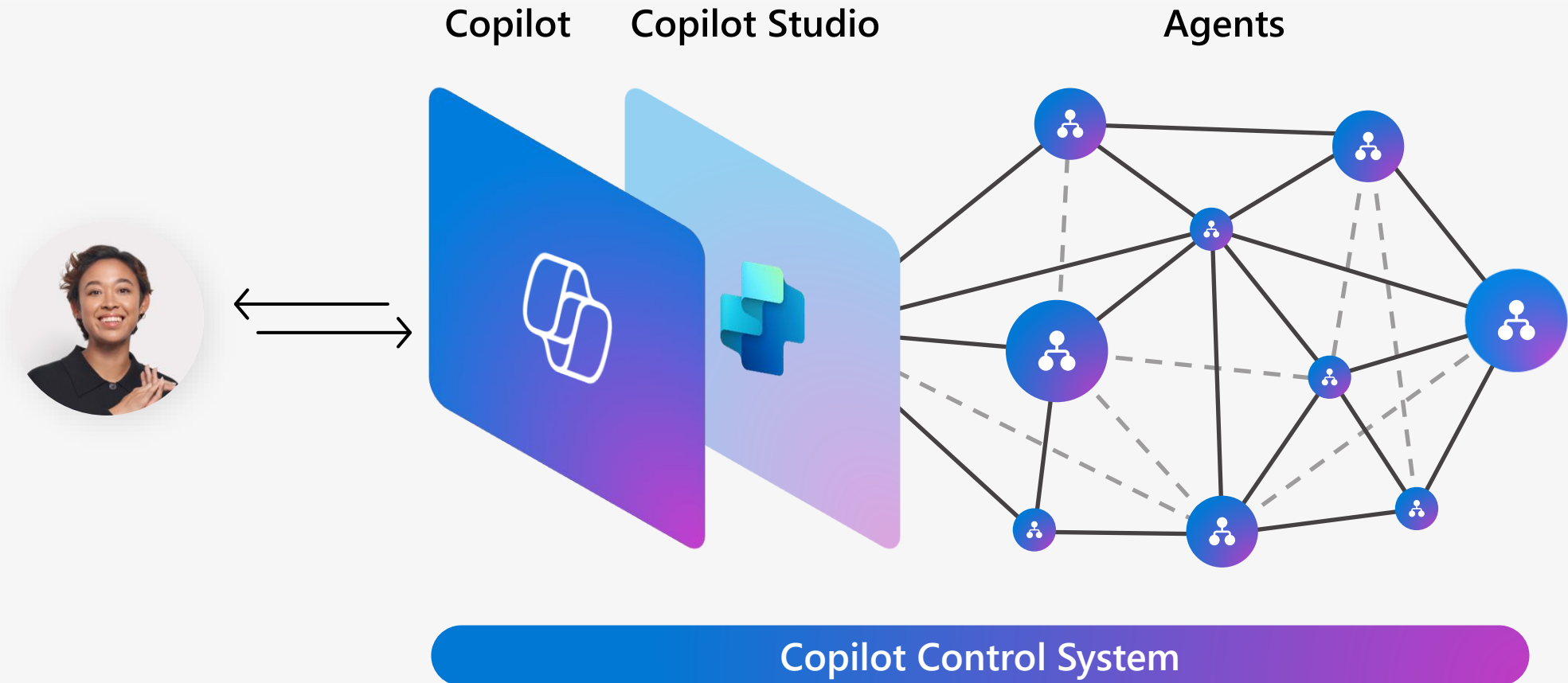


Skills agent



← Adoption and measurement →
Microsoft Viva

Copilot + Agents



Copilot Studio is the platform for Copilot agents

Deploy and use Copilot agents in any system



Microsoft 365

Add Copilot agents that give Copilot focused knowledge and new skills.



Your applications

Deploy Copilot agents to your website and other line of business applications.



Dynamics 365

Build Copilot agents that integrate and improve business processes.



Power Platform

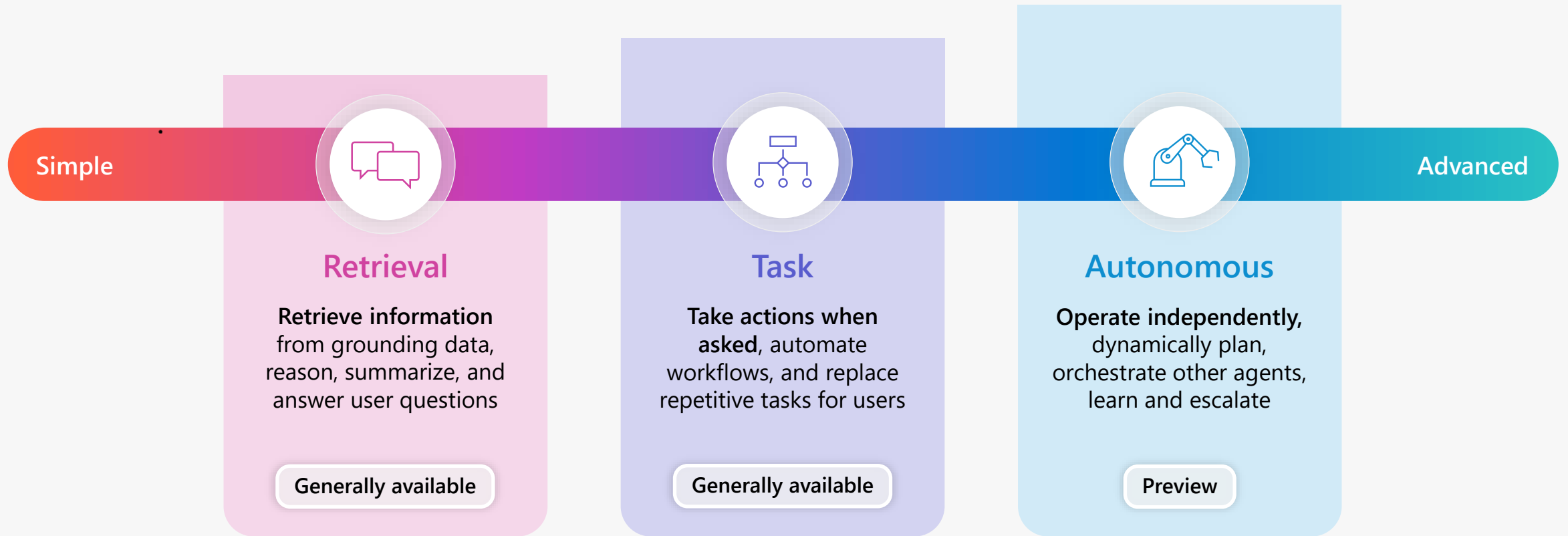
Extend Power Platform with Copilot agents that transform your low code apps and pages.



Build and customize

your agents using
Copilot Studio

Spectrum of agents



←..... Agents vary in levels of complexity and capabilities depending on your need→

Explore a continuum of solutions

IT Helpdesk agent

How do I connect to the corporate network?



Device Refresh agent

Request a new laptop and send approvals via IT Service tool.



Lead Gen agent

The agent has identified and researched 15 new leads for you to review.





Project Tracker agent

What is the status of phase 2 for project X and the remaining budget?



Budget Management agent

Review outstanding open PO's and begin financial planning.

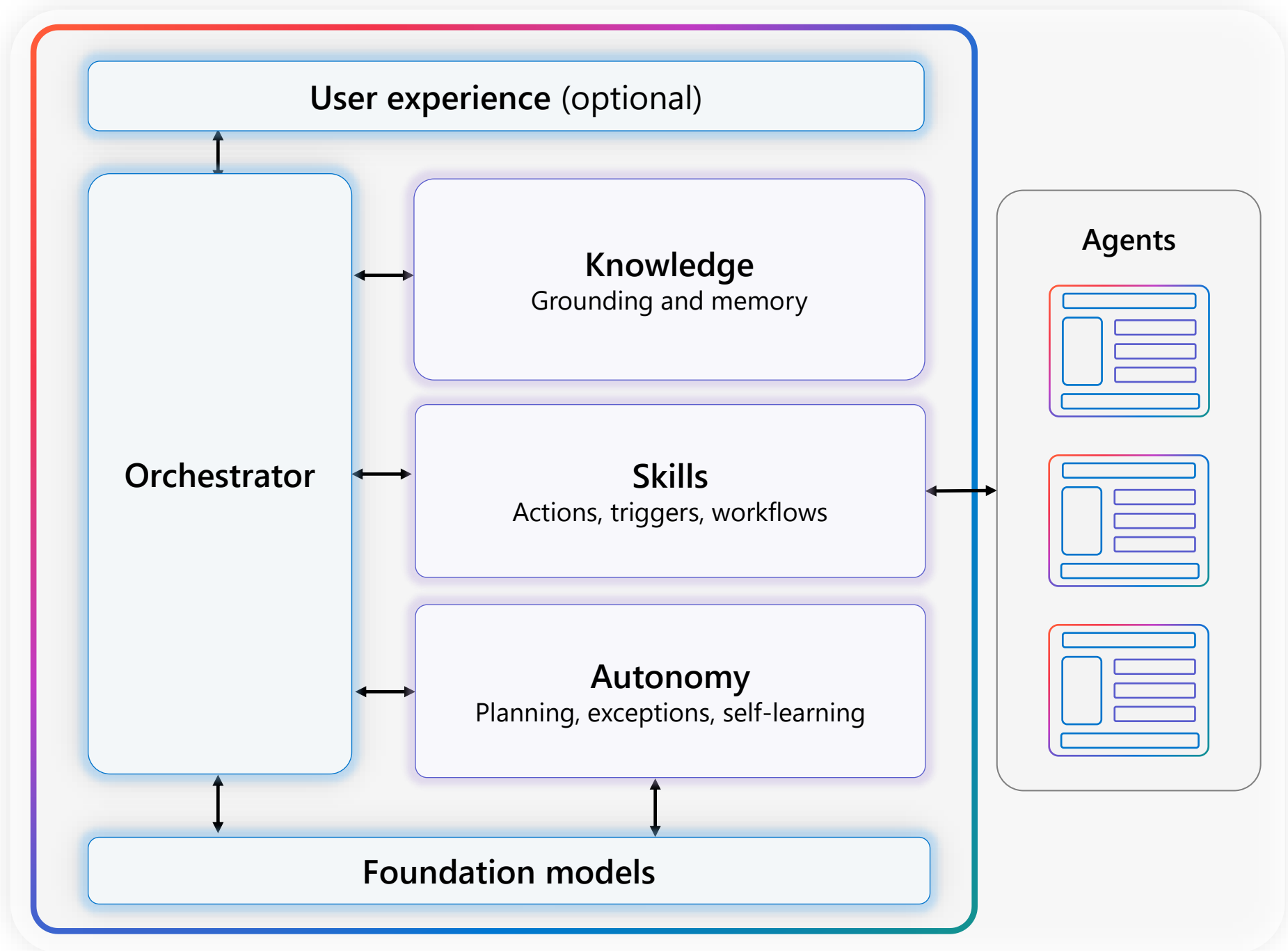


Customer Support agent

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



Copilot + Agents





Microsoft 365 Copilot unlocks value and opportunity



Every employee
Universal tasks



Customer
Service



Sales



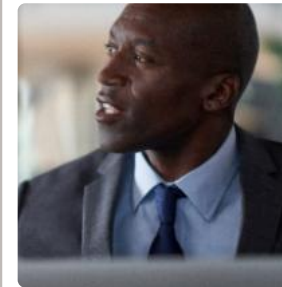
Finance



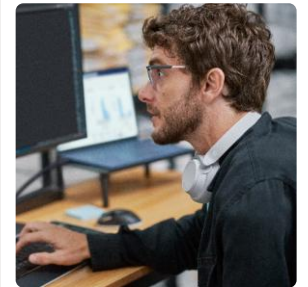
Marketing



HR



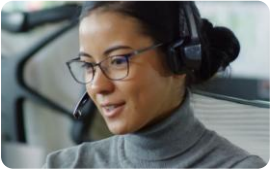
Legal



IT

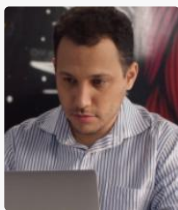
Function-specific tasks

Redefine business processes with agents

						
Customer Service	Sales	Finance	Marketing	HR	Legal	IT
Self-help	Customer self-service	Quote to cash	Customer insights & strategy	Employee engagement	Regulatory & compliance management	Data management
Support assignment	Lead generation	Record to report	Demand generation	Recruiting	Contracting	Software management & acquisition
Issue diagnosis	Customer engagement	Tax & treasury	Content creation	HR admin & payroll	Risk management	Device management
Problem resolution	Negotiations & closing	Planning & analysis	Campaign execution	Compensation & benefits	Litigation	IT operations
Continuous improvement	Post-sale follow-up & upsell	Risk management and compliance	Predictive analysis	Learning & development	Consultation	Network operations
	Sales analysis & forecasting	Procure-to-pay	Personalization	Talent management	Intellectual property	Information security
			Sales enablement & recommendation	HR strategy & planning	Advisory services	Change management & user adoption

Redefine business processes with agents

Agents from the store

								
Every Employee	Customer Service	Sales	Finance	Marketing	HR	Legal	IT	
Universal jobs		Function-specific jobs						
								
								
								

With a growing marketplace of first- and third-party agents – spanning across business function and industry – you can seamlessly bring the apps and tools you need into Microsoft 365 Copilot.

Build your own



Copilot Studio



Finance agents in Microsoft 365

Accelerate business impact and reduce cost with agents for finance processes

The screenshot shows an Excel spreadsheet titled "Reconciliation Report". It contains two main tables: "Sales Invoices Prepared" and "Posted Sales Tax ERP". The "Sales Invoices Prepared" table lists various sales orders with columns for invoice number, date, sales tax code, and amount. The "Posted Sales Tax ERP" table lists posted sales tax entries with columns for invoice number, date, sales tax code, and amount. The report also includes a section for "Unmatched transactions (0)" and a "Potentially matched transactions (12)" section.

Invoice	Date	Sales tax code	Sales tax amount in company currency
CS1000000000	Sales order	Canada	\$15,196.55
CS1000000001	Sales order	Canada	\$15,196.55
CS1000000002	Sales order	Canada	\$15,196.55
CS1000000003	Sales order	Canada	\$15,196.55
CS1000000004	Sales order	Canada	\$15,196.55
CS1000000005	Sales order	Canada	\$15,196.55
CS1000000006	Sales order	Canada	\$15,196.55
CS1000000007	Sales order	Canada	\$15,196.55
CS1000000008	Sales order	Canada	\$15,196.55
CS1000000009	Sales order	Canada	\$15,196.55
CS1000000010	Sales order	Canada	\$15,196.55
CS1000000011	Sales order	Canada	\$15,196.55
CS1000000012	Sales order	Canada	\$15,196.55
CS1000000013	Sales order	Canada	\$15,196.55
CS1000000014	Sales order	Canada	\$15,196.55
CS1000000015	Sales order	Canada	\$15,196.55
CS1000000016	Sales order	Canada	\$15,196.55
CS1000000017	Sales order	Canada	\$15,196.55
CS1000000018	Sales order	Canada	\$15,196.55
CS1000000019	Sales order	Canada	\$15,196.55
CS1000000020	Sales order	Canada	\$15,196.55
CS1000000021	Sales order	Canada	\$15,196.55
CS1000000022	Sales order	Canada	\$15,196.55
CS1000000023	Sales order	Canada	\$15,196.55
CS1000000024	Sales order	Canada	\$15,196.55
CS1000000025	Sales order	Canada	\$15,196.55
CS1000000026	Sales order	Canada	\$15,196.55
CS1000000027	Sales order	Canada	\$15,196.55
CS1000000028	Sales order	Canada	\$15,196.55
CS1000000029	Sales order	Canada	\$15,196.55
CS1000000030	Sales order	Canada	\$15,196.55
CS1000000031	Sales order	Canada	\$15,196.55
CS1000000032	Sales order	Canada	\$15,196.55
CS1000000033	Sales order	Canada	\$15,196.55
CS1000000034	Sales order	Canada	\$15,196.55
CS1000000035	Sales order	Canada	\$15,196.55
CS1000000036	Sales order	Canada	\$15,196.55
CS1000000037	Sales order	Canada	\$15,196.55
CS1000000038	Sales order	Canada	\$15,196.55
CS1000000039	Sales order	Canada	\$15,196.55
CS1000000040	Sales order	Canada	\$15,196.55
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CS1000000045	Sales order	Canada	\$15,196.55
CS1000000046	Sales order	Canada	\$15,196.55
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CS1000000048	Sales order	Canada	\$15,196.55
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CS1000000050	Sales order	Canada	\$15,196.55
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CS1000000059	Sales order	Canada	\$15,196.55
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CS1000000065	Sales order	Canada	\$15,196.55
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CS1000000068	Sales order	Canada	\$15,196.55
CS1000000069	Sales order	Canada	\$15,196.55
CS1000000070	Sales order	Canada	\$15,196.55
CS1000000071	Sales order	Canada	\$15,196.55
CS1000000072	Sales order	Canada	\$15,196.55
CS1000000073	Sales order	Canada	\$15,196.55
CS1000000074	Sales order	Canada	\$15,196.55
CS1000000075	Sales order	Canada	\$15,196.55
CS1000000076	Sales order	Canada	\$15,196.55
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CS1000000081	Sales order	Canada	\$15,196.55
CS1000000082	Sales order	Canada	\$15,196.55
CS1000000083	Sales order	Canada	\$15,196.55
CS1000000084	Sales order	Canada	\$15,196.55
CS1000000085	Sales order	Canada	\$15,196.55
CS1000000086	Sales order	Canada	\$15,196.55
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CS1000000090	Sales order	Canada	\$15,196.55
CS1000000091	Sales order	Canada	\$15,196.55
CS1000000092	Sales order	Canada	\$15,196.55
CS1000000093	Sales order	Canada	\$15,196.55
CS1000000094	Sales order	Canada	\$15,196.55
CS1000000095	Sales order	Canada	\$15,196.55
CS1000000096	Sales order	Canada	\$15,196.55
CS1000000097	Sales order	Canada	\$15,196.55
CS1000000098	Sales order	Canada	\$15,196.55
CS1000000099	Sales order	Canada	\$15,196.55
CS1000000100	Sales order	Canada	\$15,196.55

The screenshot shows the "Recon agent" configuration interface. It includes a "Data source" section with a "SharePoint site url" field set to "/Sharepoint.com/%20Documents/Recon". Below this is a "Library" field set to "/Sharepoint.com/%20Documents/Recon/Agent" and a "Folder" field set to "/Sharepoint.com/%20Documents/Recon/Agent/March". The "Settings" section includes a "Trigger" dropdown set to "Event", a "Schedule" dropdown set to "Coming soon", and a "Recipient (2)" field with two email addresses: "Devon Fox" and "Joshua Vanburen". A "Template" dropdown is set to "Recon template". At the bottom, there are "Save" and "Cancel" buttons.

The screenshot shows an Outlook inbox with a list of emails. The selected email is from "Kristin Watson" with the subject "Urgent Review Required". The email body contains a message about a review required for the customer Fabrikam (US). The email is dated 2/23/2024, 9:55 AM.

The screenshot shows the "Finance insights" sidebar. It includes a "Customer" section with a warning icon and the text "358 overdue invoices. See details". Below this is a "Contact" section with a profile picture and the name "Jane Cooper". The sidebar also includes a "Note" section with a "New note" button.

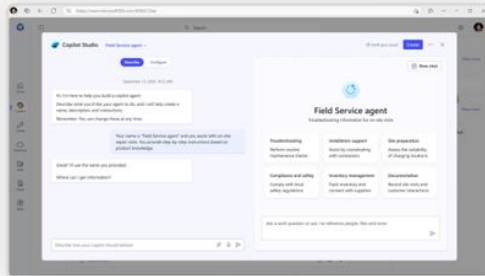
Accelerate impact
Deliver new insight and reduce the time it takes to compile and analyze data

Reduce cost
Drive efficiency by applying AI to optimize manual, labor-intensive processes

Agent tooling

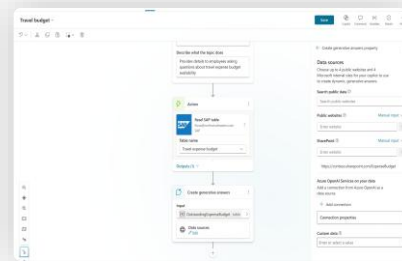


For End Users



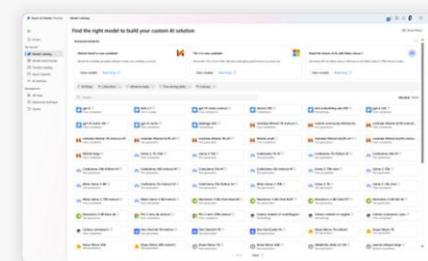
Agent builder

For Makers



Copilot Studio

For Developers

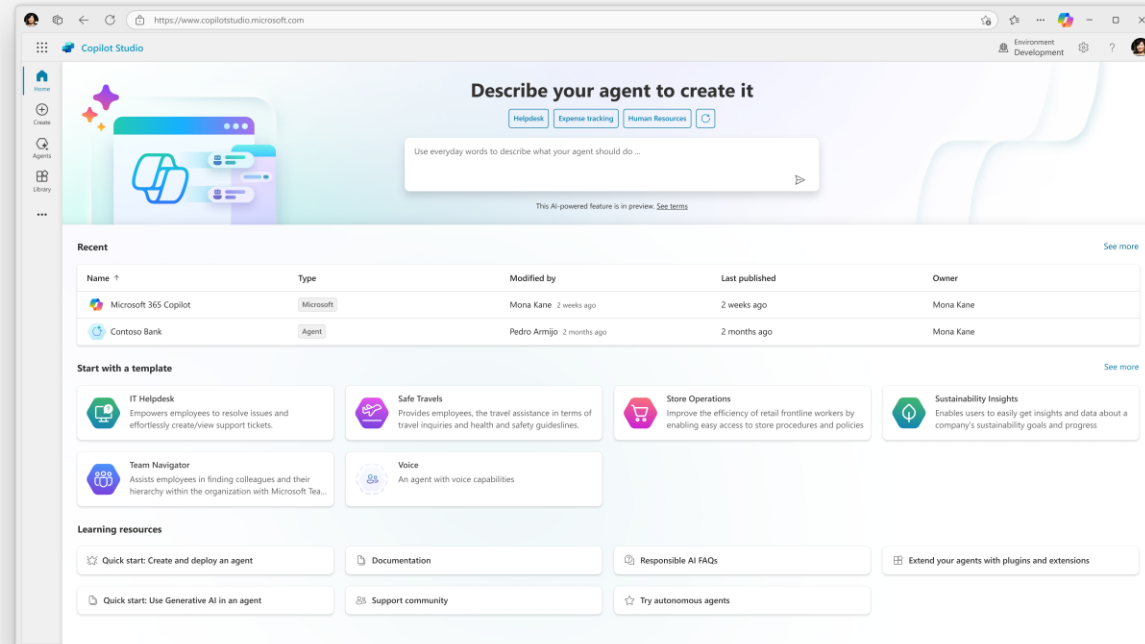


Copilot Studio + Azure AI



Copilot Studio

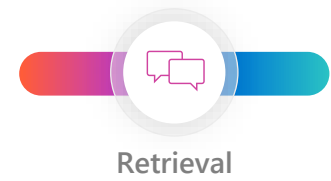
Copilot Studio is the solution to build agents that **extend Microsoft 365 Copilot** or **operate standalone**.



- ✓ Meet your users where they already are
- ✓ Access everything in one place
- ✓ Automate your workflows
- ✓ Integrate with your external apps
- ✓ Connect to your data in Microsoft 365

Example

Retrieval



1) Trigger



2) Instruction



3) Plan



4) Outcome

The agent automatically reacts to triggers



When a request comes from Copilot

The agent follows instructions provided by the maker

Instructions

- You assist with onsite repair visits. You provide step-by-step instructions based on product knowledge



The agent takes action using your data and knowledge



Product Information



The agent generates a response

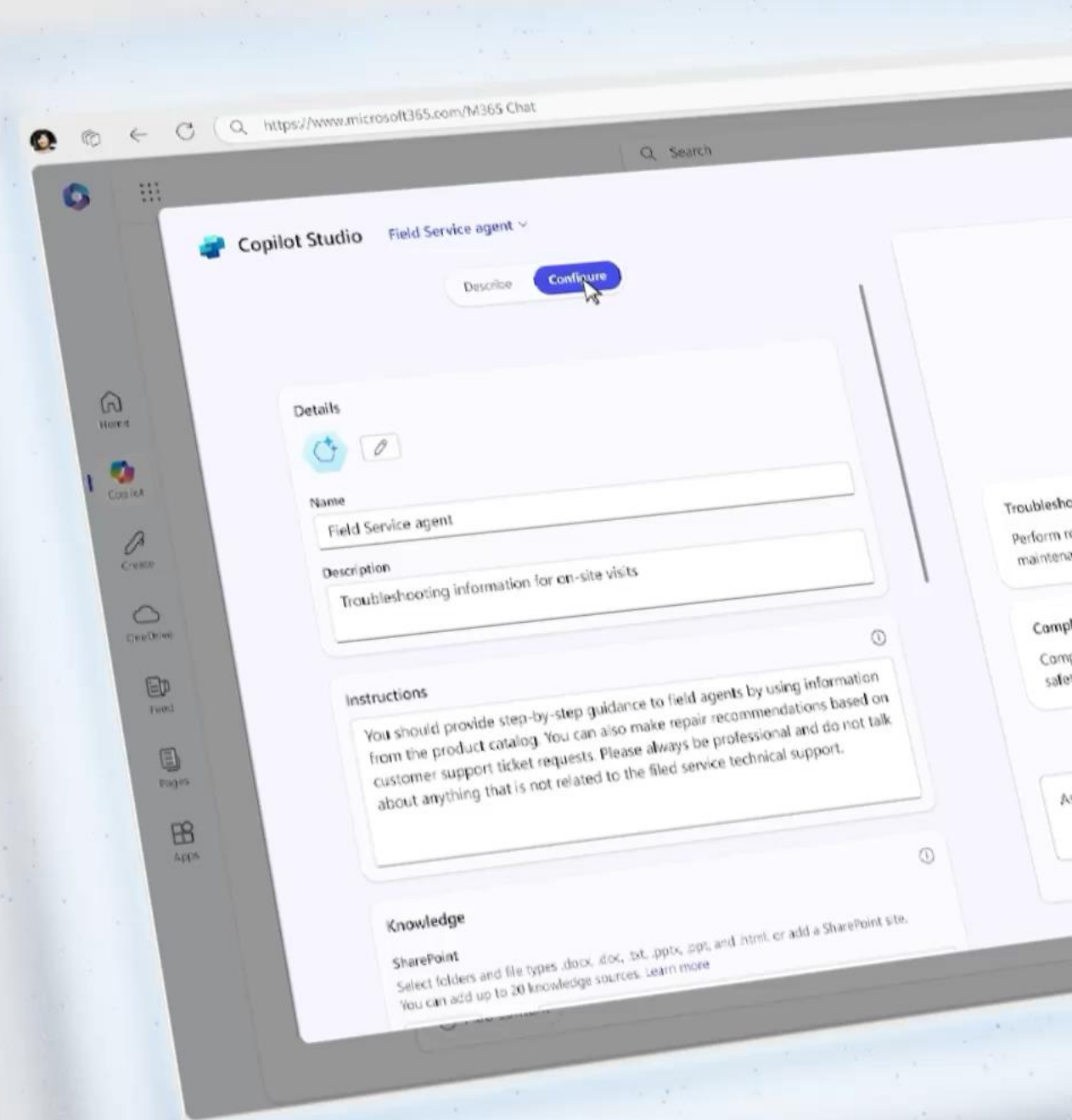


Agent

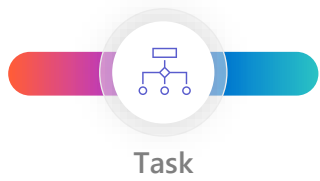
Check out step-by-step step guide for the error code you shared



Microsoft 365 Copilot Copilot **Studio** Agent builder



Example Task



1) Trigger

The agent automatically reacts to triggers



When a request comes from Microsoft Teams

2) Instruction

The agent follows instructions provided by the maker

Instructions

- HR copilot to help answer common HR related questions and help with common tasks like checking vacation balances. Keep it professional, but friendly.

3) Plan

The agent takes action using your data and knowledge



Contoso.com



Training resources



Check vacation balance

4) Outcome

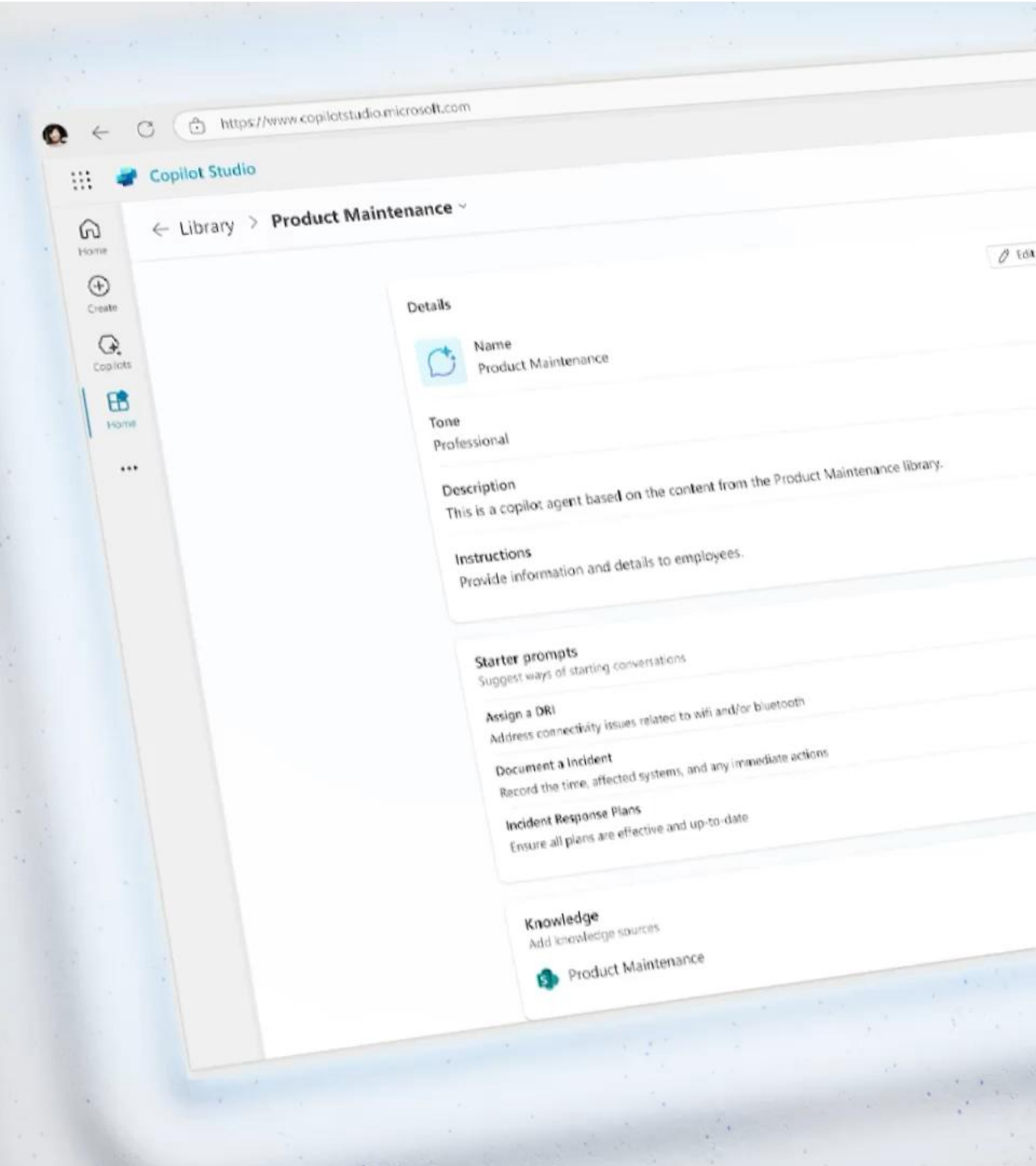
The agent generates a response



Agent

In the last 30 days, 2 training courses were added. You can check them out [here](#)

Microsoft 365 Copilot Copilot Studio Advanced Customization



Example

Autonomous



1) Trigger



2) Instruction



3) Plan



4) Outcome

The agent automatically reacts to triggers



When a new email arrives
Office 365 Outlook

The agent follows instructions provided by the maker

Instructions

- You are an agent that helps to evaluate and staff incoming engagement requests from clients.
- First, analyze the incoming email to extract key client details. Verify the engagement information and confirm the industry sector. Assess historical data and identify the required expertise. Assign a suitable partner and notify them. Log the engagement details and inform the engagement director.



The agent takes action using your data and systems



Engagement staffing logic



Submit engagement



Send an email



Retrieve partner



Message in Copilot



The agent generates a response



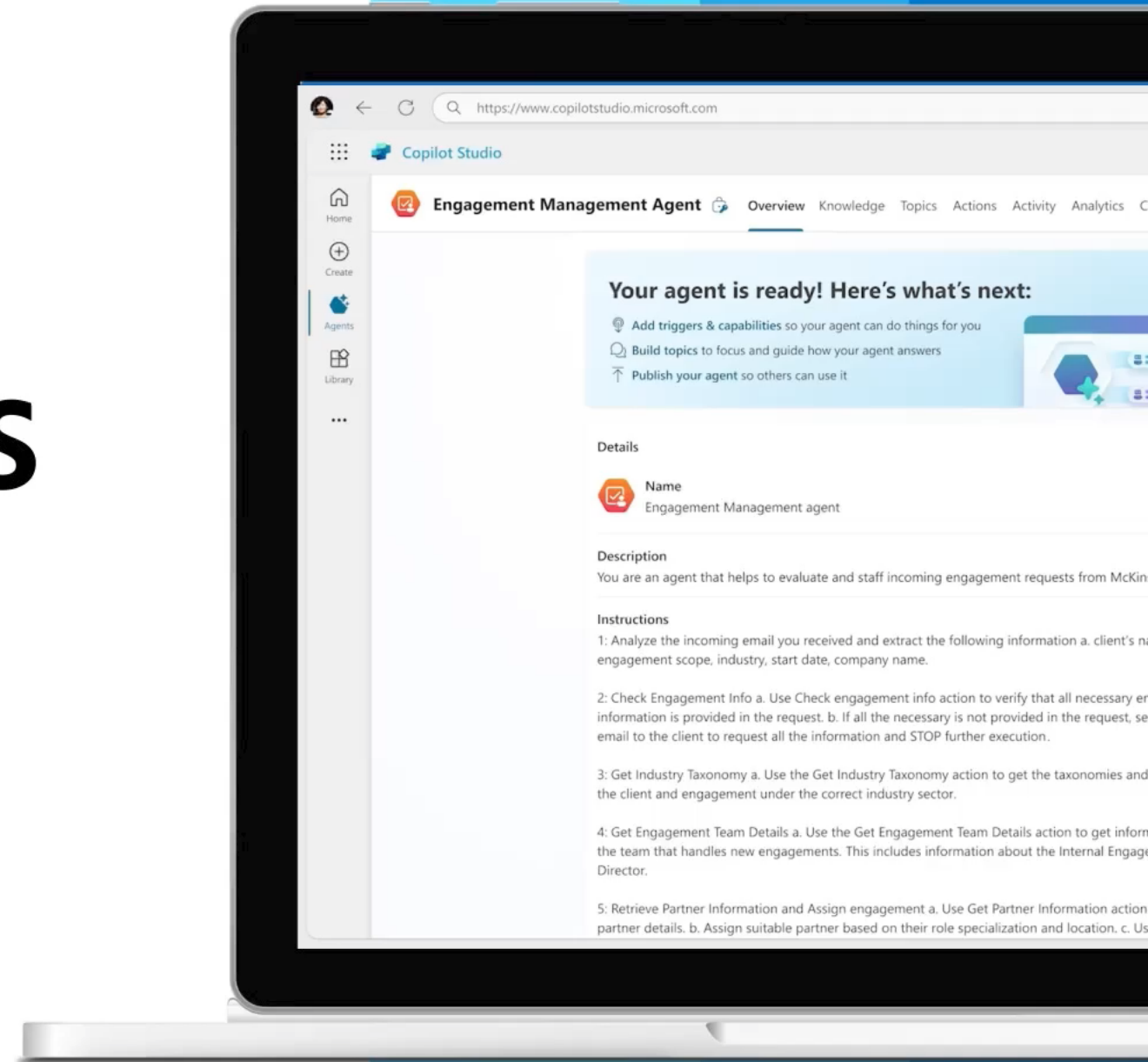
Agent

You have been assigned to a new engagement requiring your expertise in Technology Solutions.



Copilot Studio

Autonomous Agent





← Adoption and measurement →
Copilot Control System

Functional transformation

Monolithic CRM & ERP Systems

Manual, disconnected experiences

Multiple apps and UIs

Difficult to customize & extend



Intelligent business applications

AI-powered, unified experience
across multiple data sources

Integrated into flow of work

Dynamic workflows & processes

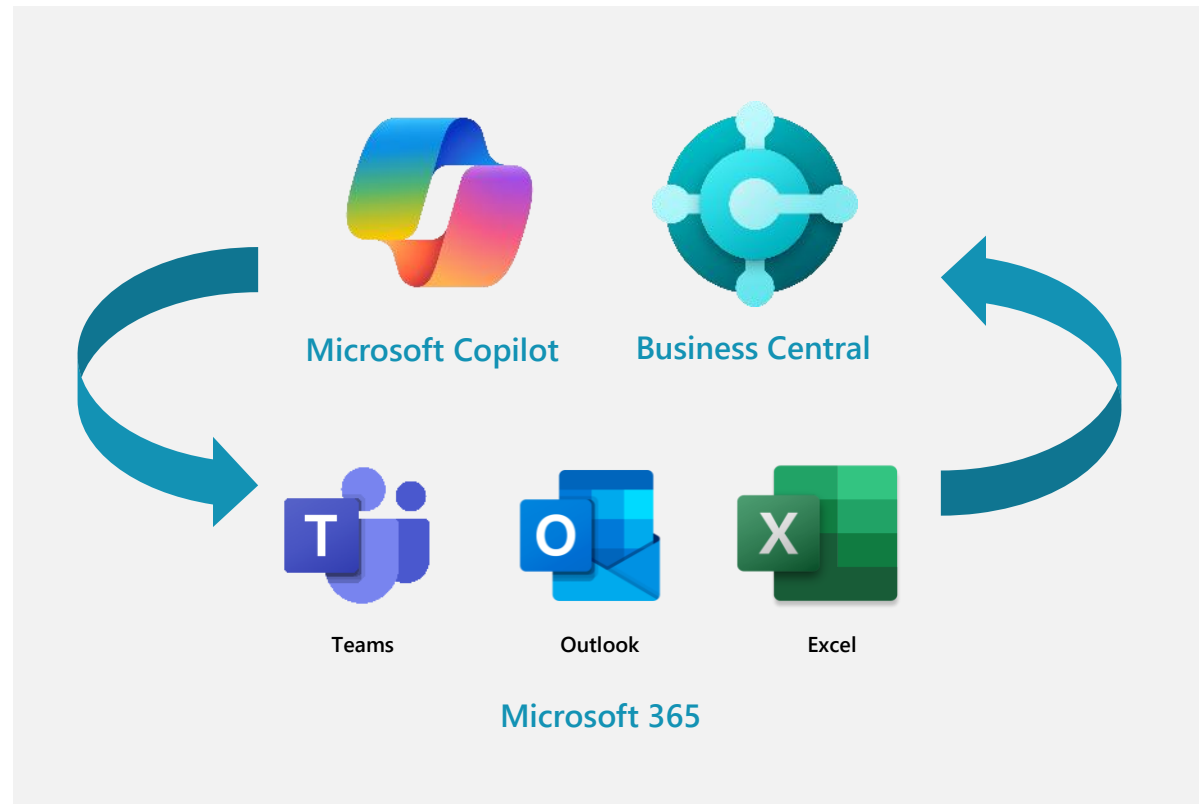
Already using Microsoft Outlook, Teams, and Excel? Work smarter with Business Central.

Seamlessly connect Business Central + Microsoft 365 and harness the power of Microsoft Copilot

Collaborate in the apps where teams work best. Connect Business Central to Outlook, Excel, and Teams— work seamlessly together with timely data.

Stay in the flow of work. Get the data employees need in the tools they prefer— without switching applications.

Connect the dots with Microsoft Copilot. Work between applications with greater continuity, guided by AI. Get help drafting emails, summarizing information, and more —no matter where you work.



Simple Gen-AI decision guide

I want a generative AI solution

I want to build a solution with custom data and UI and deploy internally or externally

I want out-of-the-box solutions that work with my existing data estate for my employees

I want full control over PaaS services and customize with code

I want a SaaS tool to build with natural language and GUI

I want insights and actions on Microsoft 365 data and products

I want role-specific insights and actions for sales, service, and financial professionals that integrate with external CRM and ERP systems that also connect data to Microsoft 365 productivity apps



Azure AI Studio



Copilot Studio



Microsoft 365 Copilot

Enhanced Together



Copilot for Sales



Copilot for Service



Finance agents

Add-ons to Copilot for Microsoft 365



Azure Service Meter



Tenant Capacity Pack



Per User



Per User



Per User



Per User