



Microsoft 365
Copilot

AI Agents

Your Competitive Edge in the Digital Era

E-book



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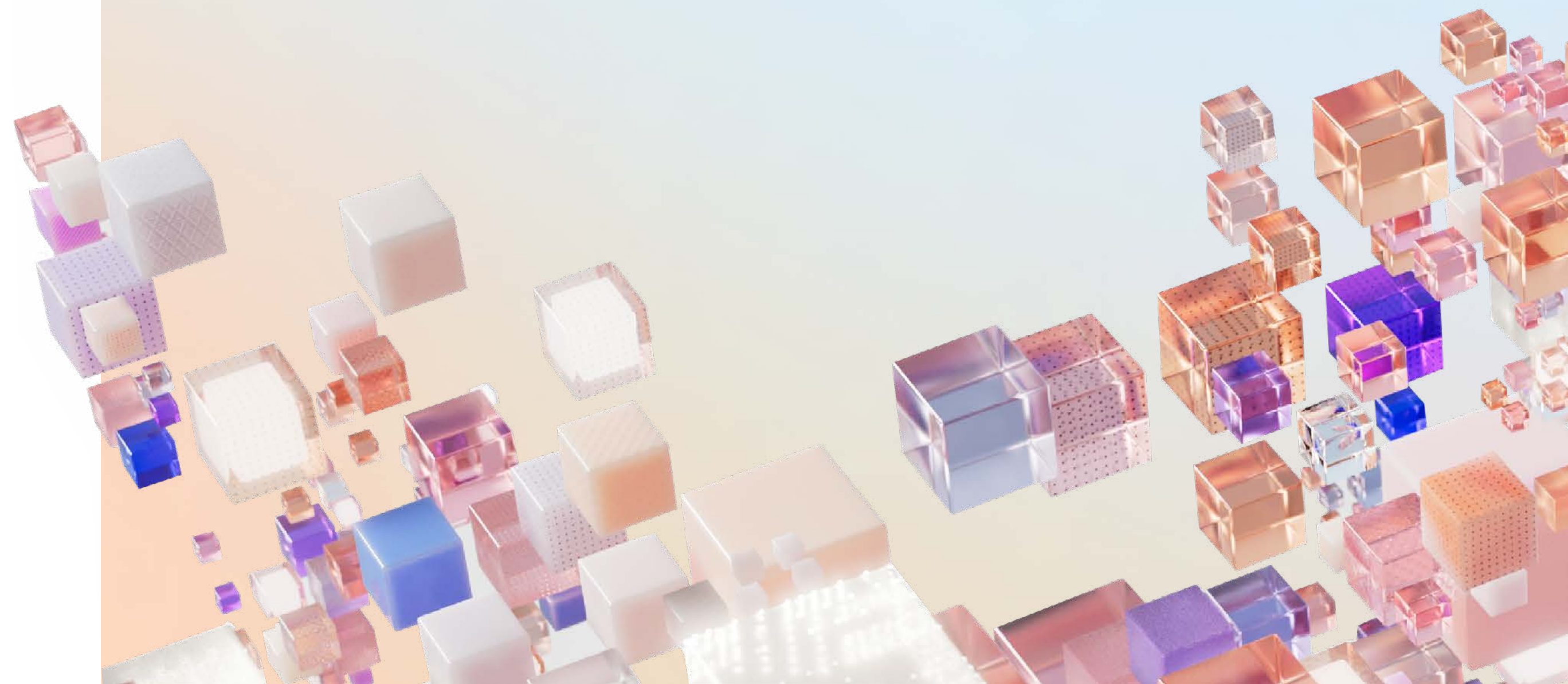
The age of agents: Transform your business operations

Imagine teams that never slow down, never miss a detail, and never stop improving how work gets done—an always-on, digital workforce acting not just in response to user-initiated queries but autonomously driving shared goals and objectives.

Agents are that workforce—tirelessly analyzing, automating, and accelerating operations in ways once thought impossible. They don't just assist; they act. Without waiting for commands, they take initiative, handle tasks, make decisions, and deliver measurable results.

Where generative AI assistants have been empowering individuals, agents are revolutionizing how entire organizations work at scale.

Agents fundamentally change how work happens across every department—from Customer Service and IT, to Sales, Legal, Marketing, and more.



In this e-book, you'll discover how agents are transforming the way businesses operate. Learn how to free teams from time-consuming and mundane tasks so they can focus on innovation.

Uncover transformative insights buried in your data that would be impossible for any person to find on their own. Solve both simple and complex business challenges with incredible speed and accuracy.

Ready to expand the impact of AI from individual productivity gains to organization-wide transformation? Agents are the key to unlocking your next level of operational excellence. We'll show you how to get there.



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The efficiency multipliers

Agents are AI-powered digital workers that execute tasks and automate complex business processes across your organization. They connect systems, analyze data, and complete workflows—transforming operations by handling work that previously required human attention.

Organizations are embedding agents into operations to increase efficiency, accelerate decision-making, and drive innovation at scale. These agents go beyond assisting individuals. They automate processes, streamline operations, and enhance agility—freeing teams to focus on high-value work that fuels growth.

Consider the opportunity agents represent for your organization:

"If I only had more time to think."

Turn time spent on repetitive, low-value tasks into innovation

Routine but essential tasks like data entry, scheduling, and reporting can now be handled by agents, cutting errors and giving employees more time for creative, high-impact work. Imagine redirecting hours spent on spreadsheet maintenance toward developing new ideas and innovations that drive your business forward.

"There's got to be a better way."

Resolve frustrating process bottlenecks for greater efficiency

Agents streamline complex, fragmented workflows by automating reports, verifying data, and catching errors before they cause delays. The result? Fewer bottlenecks, reduced risk, and smoother operations across interconnected workflows.

"We don't have a data problem; we've got an insight problem."

Transform data overload into clear, actionable insights

Your organization has plenty of data—but limited time to make sense of it all. Agents quickly process complex data streams, uncovering hidden opportunities your teams might miss while managing the daily information flood.



"If only we had caught that earlier."

Prevent inconsistencies and errors before they cause costly delays

When data discrepancies and overlooked details derail projects, costs climb quickly. Agents can proactively validate information, flag inconsistencies, and ensure compliance before small errors become major setbacks. The result? Fewer surprises, smoother workflows, and more reliable outcomes.

"We just don't have the bandwidth."

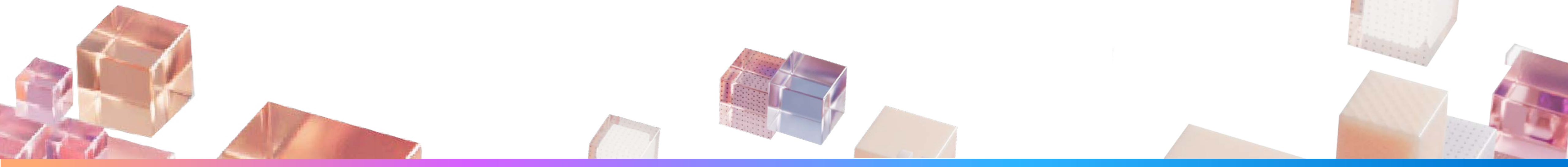
Solve scaling and resource limitations

When limited resources stretch your teams too thin, burnout and inefficiency follow. Agents help you scale operations by automating routine tasks and optimizing workflows, creating valuable time for strategic priorities. With agents, you can expand capacity without overextending your workforce.

"This is taking forever to get moving."

Accelerate decision making and improving responsiveness

Decisions stall when leaders don't have timely, relevant insights. Agents can deliver real-time data and recommendations that accelerate decision-making. No more waiting on reports—just fast, informed action to move forward with confidence.



Agents aren't just tools.
They're powerful business
catalysts that work around
the clock to clear obstacles
across your organization.

Copilot + agents: AI that works together

Are Copilot and agents the same? Not quite. Both are AI-powered, both drive productivity—but they operate at different levels, working together to transform how work gets done.

Copilot enhances individual productivity, assisting employees with tasks like drafting emails, analyzing spreadsheets, and summarizing documents—all within familiar Microsoft 365 applications.

Agents take AI further, automating enterprise-wide workflows. They don't just assist, they execute. They connect systems, manage multi-step processes, and run continuously; handling work even when no one's watching.

Copilot helps when you ask, while agents work on their own, keeping business operations moving even when you're focused elsewhere. Together, they form a powerful AI ecosystem—boosting personal efficiency and scaling automation across your entire organization.



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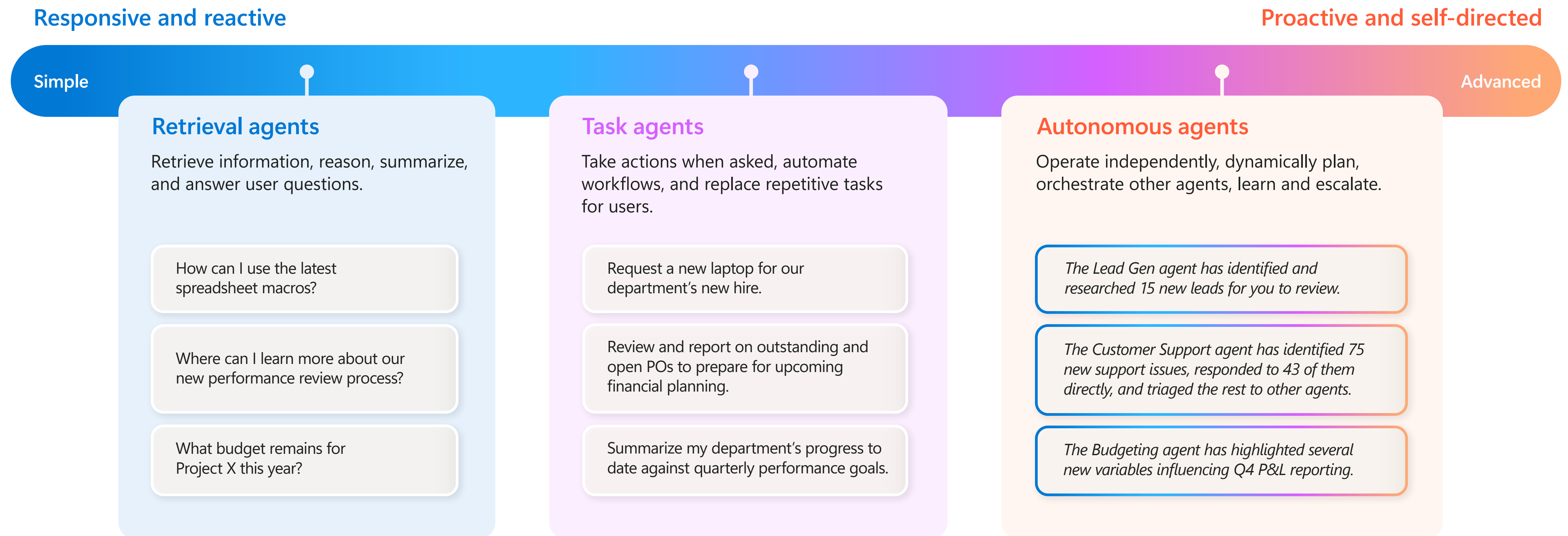
Understanding agents, from retrieval through autonomy

Agents perform actions on your organization's behalf, going beyond answering questions to helping get work done. They can work independently to analyze information, make decisions based on your business rules, and complete tasks without constant supervision.

These digital tools operate continuously, handling everything from routine tasks to orchestrating highly complex processes without requiring constant oversight.

What makes agents so powerful is how they connect your systems and data. By having access to your business applications—from CRM platforms to financial systems to productivity solutions—they can build and execute seamless workflows spanning your entire organization.

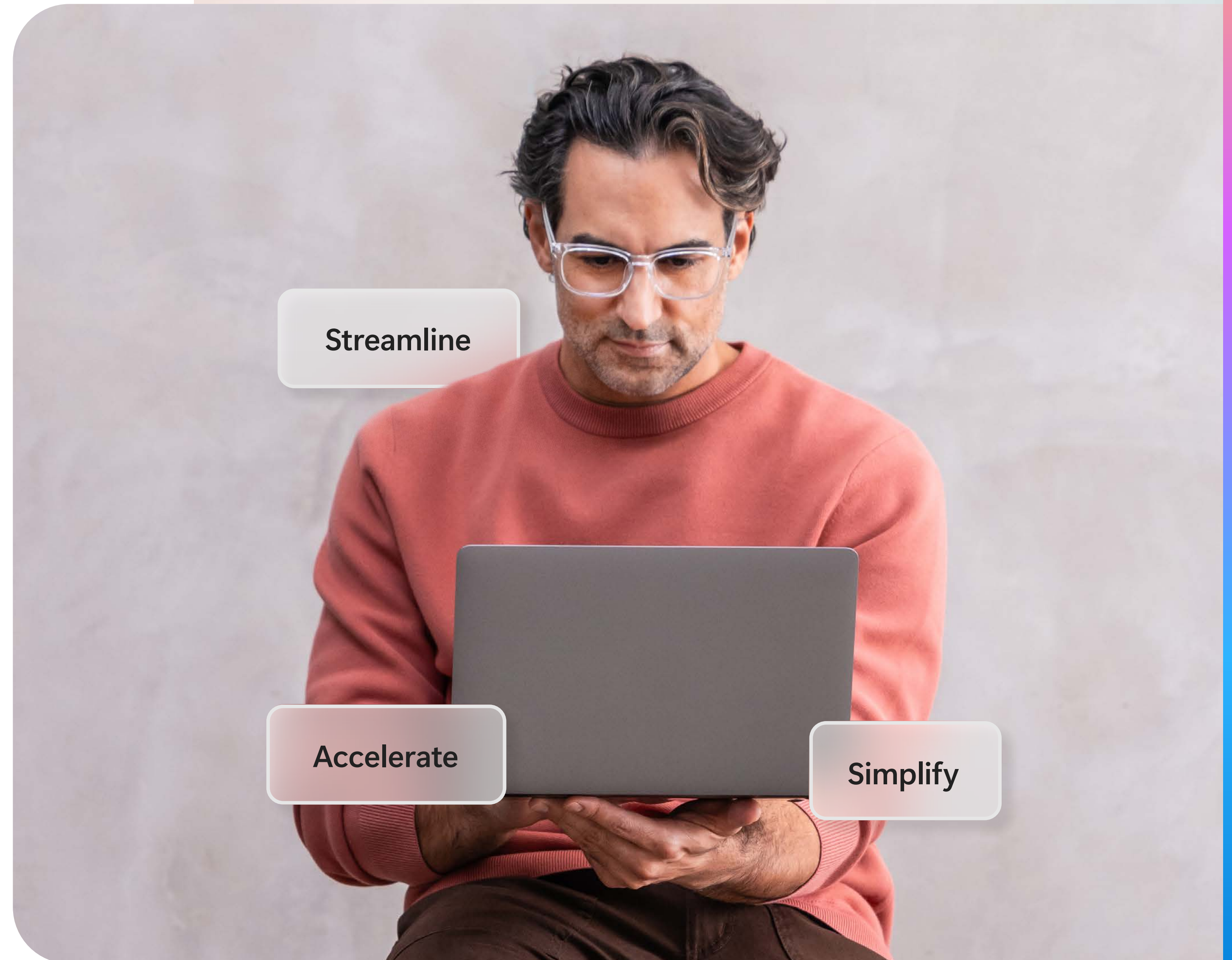
Agents operate across a spectrum of capabilities:



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Pre-built agents are ready to work now

As we've seen, agents are practical solutions solving real business opportunities. But what can they really do for you? There are dozens of pre-built agents ready to use in Microsoft 365 Copilot, with more emerging every day.



Let's look at two examples of pre-built agents ready to use now in Microsoft 365:

The Facilitator Agent in Microsoft Teams

The agent boosts meeting productivity by automatically capturing and organizing notes in real time. Teams stay focused and engaged in meaningful discussion rather than frantically typing notes. The agent transcribes conversations as they happen, organizes key points by topic, tracks follow-up tasks, and maintains clear attribution.

Here's how it works:

After the meeting ends, everything appears in the Recap tab, ensuring accuracy and accountability. The result? Fewer missed details, faster decisions, and meetings that drive action—rather than creating more work.

See it in action

The Project Manager Agent in Microsoft Planner

The agent eliminates project management headaches by handling plan creation, task tracking, and progress monitoring for you. Your team can generate AI-powered plans with tasks automatically assigned based on project goals—keeping everything on track without tedious manual setup.

Here's how it works:

The agent intelligently moves tasks through board views, flags items needing attention, and organizes completed work for easy review. With Microsoft Whiteboard integration, brainstorming sessions transform directly into actionable tasks. Your team spends less time managing project details and more time delivering meaningful results.

See it in action



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Build custom agents for your business needs

Microsoft Copilot Studio makes it incredibly easy to build custom agents. With its intuitive, no-code interface, anyone in your organization can create powerful agents in minutes—simply by describing what they want to create in their own words.

Imagine a blank canvas where your organization's challenges meet unlimited solutions. Copilot Studio isn't just a platform; it's your gateway to reimagining how work happens. Turn your boldest ideas into digital workers that transform your business, create agents that anticipate needs, and design workflows that seemed impossible yesterday.

These easy-to-build agents can:

- Unify your business systems through 1,500+ pre-built connectors
- Automate processes specific to your organization
- Ensure compliance with your security and governance requirements
- Scale from department-specific solutions to enterprise-wide deployment

Dream big. Experiment widely. Copilot Studio removes the technical barriers between your vision and reality.



Looking for somewhere to start? Here are a few ideas to spark your imagination—custom agents you could build for your organization, today:

Human Resources

Simplifying the employee journey

The Onboarding Buddy Agent

An onboarding agent can transform the experience for new employees while reducing any administrative burdens on your HR team. This agent guides new hires through the onboarding process, automatically schedules required training sessions, answers common policy questions, collects required documentation, and checks in with new employees at key milestones.

Finance

Streamlining financial operations

The Financial Reconciliation Agent

A finance agent can automate and optimize financial reconciliation tasks, reducing manual effort while improving accuracy and throughput. This agent monitors transactions across accounts to detect discrepancies, matches invoices, purchase orders, and payments, flags anomalies to reduce errors and fraud, generates reports summarizing outstanding issues, and even notifies staff of pending approvals or missing docs.

Sales

Accelerating revenue opportunities

The Lead Qualification Agent

A sales agent can continuously monitor your pipeline to identify promising leads and ensure timely follow-up. This agent scans incoming leads against customer profile, prioritizes opportunities based on key buying signals, gathers relevant information prior to sales meetings, conducts personalized outreach based on prospects' interests, and even tracks follow-up activities and prompts sales staff when needed.

Marketing

Optimizing campaign performance

The Campaign Managing Agent

This marketing agent can handle campaign optimization while marketing staff focus on creative strategy. It tracks performance across channels, identifies trends and opportunities, reallocates budget to higher-performing assets, delivers insights reports, and alerts teams to underperforming elements that need attention.

Customer Service

Providing faster, personalized service

The Traffic Managing Agent

This agent can manage incoming requests so support teams can deliver better service. The agent evaluates, prioritizes, and routes tickets based on urgency and required expertise. It suggests solutions to representatives, offers self-service options for simple issues, and analyzes patterns to help optimize your support operations.

Legal

Enhancing contract management

The Contract Review Agent

Your legal team can focus on higher priority work while this agent automates document review. It analyzes agreements for key terms and risks, highlights discrepancies, summarizes critical points, tracks deadlines and obligations, and sends notifications when actions are needed.

Your path to agentic transformation

AI agents are no longer just a concept—they're driving measurable results and business transformation today. They move AI beyond individual productivity tools into enterprise-wide systems that work continuously to optimize operations. From retrieval agents that instantly surface critical information, to task agents that streamline workflows, to autonomous agents that proactively solve complex problems—these digital workers transform how business happens.

By bringing Microsoft 365 Copilot and agents to your organization, you're investing in more than productivity tools—you're creating an intelligent ecosystem that continuously works to drive business value. The future of work is here. And with agents, your organization is ready for it.

