



Microsoft 365  
Copilot

# AI Agents

**Your Competitive Edge in the Digital Era**



EBook

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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 analysing, 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 revolutionising how entire organisations 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 eBook, 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 organisation-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 can help you more done – faster. They take on repetitive tasks, connect systems and keep workflows moving so you don't have to. Whether it's updating records, analysing data or coordinating across tools, agents work behind the scenes to simplify your day.

They're not just helpful – they're proactive. Agents automate complex processes, reduce delays and make it easier for teams to stay focused on the work that drives results. By embedding agents into everyday operations, organisations are unlocking new levels of speed, efficiency and innovation.

## Consider the opportunity agents represent for your organisation:

“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 organisation 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 optimising workflows, creating valuable time for strategic priorities. With agents, you can expand capacity without overextending your workforce.

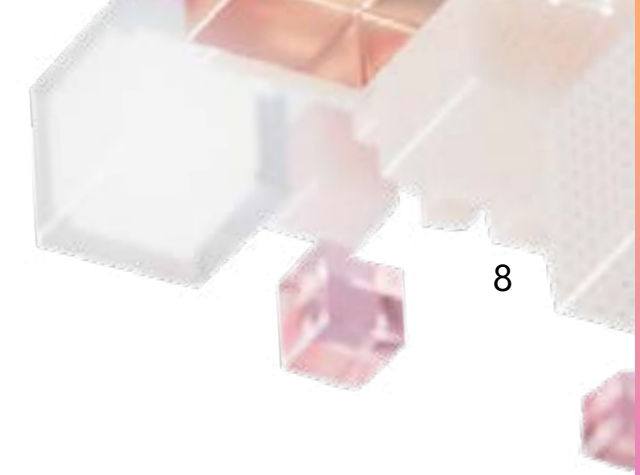
“This is taking forever to get moving.”

### 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 for 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 organisation.



## 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, analysing spreadsheets and summarising documents – all within familiar Microsoft 365 applications.

**Agents** take AI further. Not only can they work on behalf of individuals, they can automate enterprise-wide workflows. Agents connect systems, manage multi-step processes and run continuously – handling repetitive work behind the scenes. 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.

While Copilot responds to your requests, agents act independently – continuously executing tasks and driving outcomes across the organisation. Together, they create a powerful AI ecosystem that boosts individual focus and scales impact across the business.

Built and managed in Copilot Studio – Copilot's native AI agent platform – agents are grounded in enterprise data, governed with precision and designed to integrate seamlessly across your ecosystem.



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## Understanding agents, from retrieval through autonomy

Agents perform actions on your organisation's behalf, going beyond answering questions to helping get work done. They autonomously analyse enterprise data, apply your business logic and execute tasks – freeing teams from manual oversight and accelerating outcomes.

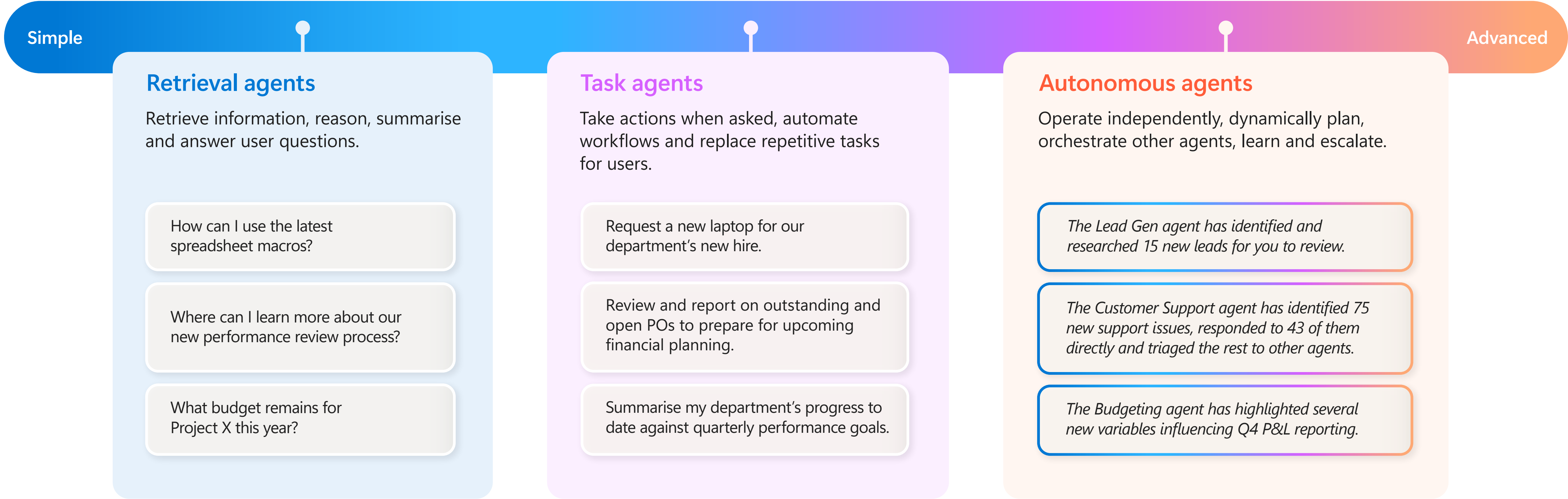
They operate continuously, handling everything from routine tasks to orchestrating highly complex processes without requiring constant oversight.

What makes agents so powerful is how they connect your systems and data. When you connect them to your line of business applications – from CRM platforms to financial systems to productivity solutions – they can build and execute seamless workflows spanning your entire organisation.

## Agents operate across a spectrum of capabilities:

Responsive and reactive

Proactive and self-directed



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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.



# Microsoft 365 Copilot

## Tackle multi-step research with Researcher agent

Researcher helps you tackle complex, multi-step research with ease. Researcher can build a detailed go-to-market strategy based on the context of all your work data and broader competitive data from the web; identify whitespace opportunities for a new product based on emerging trends and internal data; or create a comprehensive quarterly report for a client review detailing work to date along with the latest market analysis. And Researcher can leverage third-party data via connectors to enhance its capabilities and provide more comprehensive insights. It can even pull in data through other agents.

**[See Researcher in action](#)**

## Take on complex data queries with Analyst agent

Analyst thinks like a skilled data scientist, so you can go from raw data to insights in minutes. Optimised to do advanced data analysis at work, Analyst uses chain-of-thought reasoning to progress through problems iteratively, taking as many steps as necessary to refine its reasoning and provide a high-quality answer that mirrors human analytical thinking. It can run Python to tackle your most complex data queries – and you can view the code it's running in real time and check its work. For example, you can use Analyst to turn raw data scattered across multiple spreadsheets into a demand forecast for a new product, a visualisation of customer purchasing patterns or a revenue projection.

**[See Analyst in action](#)**



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# Build custom agents for your business needs

Microsoft Copilot Studio is not just a place to build agents – it's the native AI agent platform for Copilot, designed to help you architect the future of your business. Built on Microsoft and connected to everything, it multiplies capacity by integrating seamlessly with your data, tools and systems so agents can work on your behalf.

Whether you're solving department-specific challenges or scaling enterprise-wide transformation, Copilot Studio empowers you to:

- Build any agent, from simple to sophisticated, to deliver outcomes using natural language and selecting from your choice of models, knowledge, tools and channels.
- Multiply capacity by connecting agents to your business systems, data and tools through 1,500+ pre-built connectors.
- Ensure compliance with enterprise-grade governance, security and visibility at every layer – from managing data access to controlling agent sprawl.
- Scale confidently from functional use cases to enterprise-wide deployment, with real-time analytics and managed availability for mission-critical agents.

Unlock Copilot's full potential. Build agents. Stay in control.



## Discover agents in the Agent Store

The **Agent Store**, accessible through the Microsoft 365 Copilot app, is your organisation's gateway to discovering and deploying agents from Microsoft, partners and internal teams. Whether you're launching org-wide agents or exploring new ones to transform workflows, its immersive and personalised experience makes it easy to find agents and elevate productivity. Share agents seamlessly via Copilot Chat or other Microsoft 365 endpoints to supercharge collaboration. Every agent meets enterprise-grade standards for functionality, security and compliance, with IT maintaining full visibility and control.



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

## Human Resources

Simplifying the employee journey

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### **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

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### **The Financial Reconciliation Agent**

A finance agent can automate and optimise 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 summarising outstanding issues and even notifies staff of pending approvals or missing docs.

## Sales

Accelerating revenue opportunities

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### **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, prioritises opportunities based on key buying signals, gathers relevant information prior to sales meetings, conducts personalised outreach based on prospects' interests and even tracks follow-up activities and prompts sales staff when needed.

## Marketing

Optimising campaign performance

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### **The Campaign Managing Agent**

This marketing agent can handle campaign optimisation 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, personalised service

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### **The Traffic Managing Agent**

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

## Legal

Enhancing contract management

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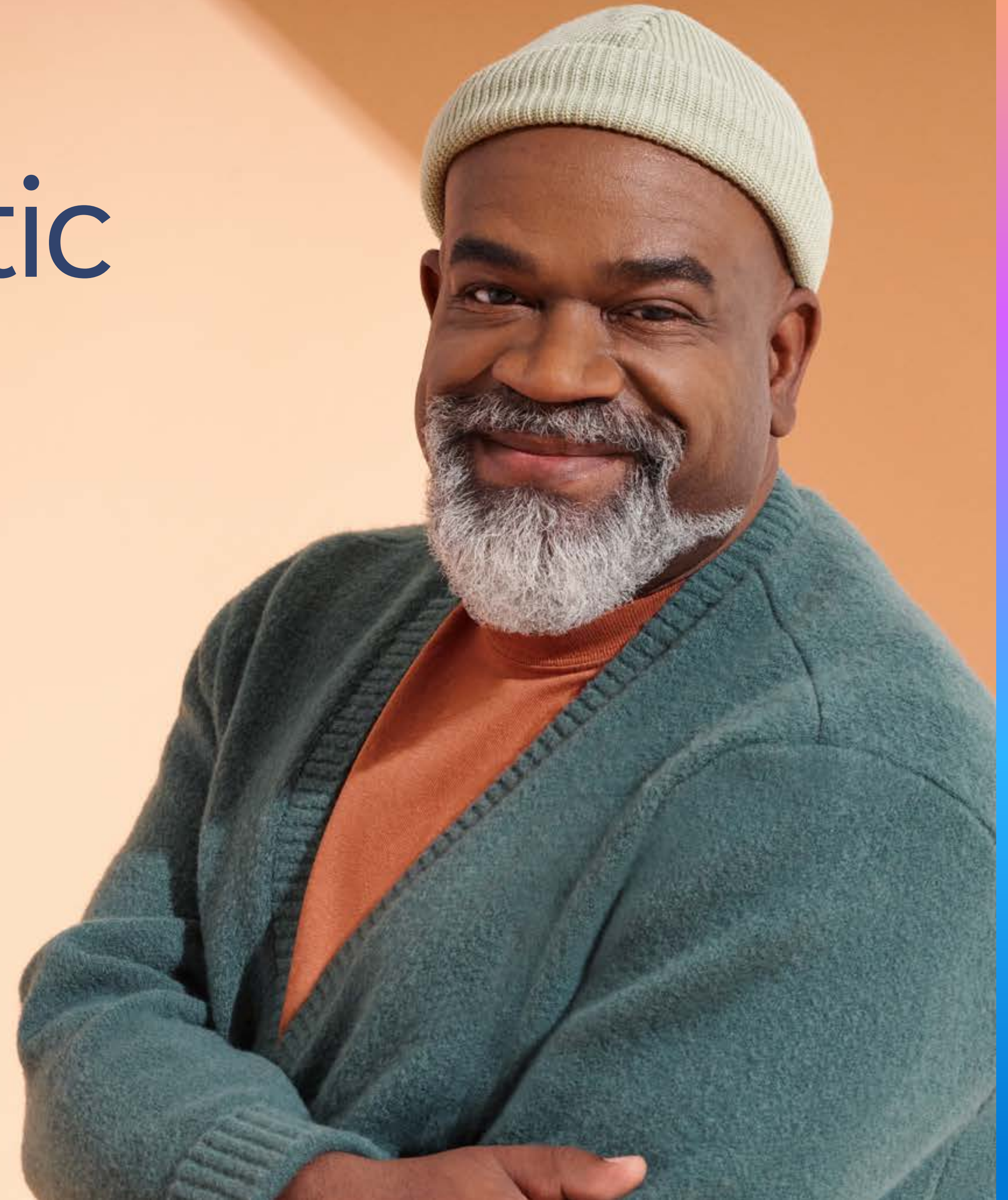
### **The Contract Review Agent**

Your legal team can focus on higher priority work while this agent automates document review. It analyses agreements for key terms and risks, highlights discrepancies, summarises 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 optimise 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 organisation, 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 organisation is ready for it.



Read the 2025 Work Trend Index to learn about the emergence of the Frontier Firm – built on intelligence on demand, human-agent teams and a once-in-a-generation shift in how we work.

**2025:**  
The Year the Frontier  
Firm Is Born

