



GETTING STARTED WITH AI AGENTS

AI THAT WORKS FOR YOU



JoLynn Rihn

Master Microsoft
Instructor



Copyright©2025 Virtual Training Co. All rights reserved. This publication or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise without written permission of Virtual Training Co, W5813 Timber Trail, New Lisbon, WI 53950.



Your Guide to Microsoft Copilot Agents

Microsoft Copilot Agents are custom AI-powered assistants that organizations can build using Copilot Studio to automate tasks, answer questions, and integrate with business processes. They extend the capabilities of Microsoft Copilot by allowing you to create specialized agents tailored to your workflows, data, and apps.



Microsoft agents are designed to work alongside users, helping to automate and execute various business processes. They are part of the Microsoft 365 Copilot platform, which leverages AI to improve efficiency and streamline operations within organizations. These agents can perform a wide range of tasks, from simple prompt-and-response interactions to fully autonomous workflows that require minimal human intervention.

Agentic AI

The next evolution in AI is here. Agentic AI is a form of artificial intelligence designed to function autonomously. But how is it different from traditional AI and generative AI?

Agentic AI can make decisions, perform tasks and adapt to its environment without constant human intervention to automate a broader range of tasks with minimal supervision.



What is Agentic AI?

Agentic AI refers to **autonomous artificial intelligence systems** designed to achieve specific goals with minimal human supervision. Unlike traditional AI, which operates within predefined constraints and requires human intervention, agentic AI exhibits **autonomy, adaptability, and goal-driven behavior**. It uses **AI agents**—



machine learning models that mimic human decision-making—to solve problems in real-time by interacting with their environment.

These systems leverage **large language models (LLMs)** and generative AI techniques to function in dynamic environments. While generative AI focuses on creating content like text or images, agentic AI extends this by using generated outputs to perform complex tasks autonomously, such as booking flights or managing workflows.

Key Features of Agentic AI

1. **Autonomy:** Agentic AI operates independently, making decisions and taking actions without constant human oversight.
2. **Adaptability:** It learns from experiences, adjusts its behavior, and improves over time using feedback mechanisms.
3. **Goal-Oriented:** These systems are programmed to achieve specific objectives, often using decision trees or reinforcement learning.
4. **Environment Interaction:** Agentic AI gathers real-time data through sensors, APIs, or user interactions to make informed decisions.
5. **Execution and Orchestration:** It can execute tasks autonomously and coordinate multiple agents to work harmoniously on complex workflows.

Applications of Agentic AI

Agentic AI has diverse applications across industries:

- **Autonomous Vehicles:** Real-time decision-making for navigation and safety.
- **Healthcare:** Monitoring patient data and recommending treatments based on new test results.
- **Finance:** Algorithmic trading and contract analysis, such as JPMorgan Chase's COiN system.
- **Cybersecurity:** Detecting anomalies in network traffic to prevent threats.
- **Smart Homes:** Managing energy consumption and security autonomously.



Challenges and Ethical Considerations

While agentic AI offers immense potential, it also poses challenges:

- **Unintended Consequences:** Poorly designed reward systems can lead to undesirable behaviors, such as spreading misinformation or risky decision-making.
- **Bias and Fairness:** Ensuring unbiased and fair decision-making is critical, as these systems can inherit biases from training data.
- **Accountability:** Determining responsibility for harmful decisions made by autonomous systems is complex.
- **Safety:** Ensuring reliable and safe operation in high-stakes environments like healthcare or transportation is paramount.

Future Outlook

Agentic AI represents a significant leap in AI technology, enabling systems to function autonomously in dynamic and unpredictable environments. However, its development requires robust frameworks to address ethical, legal, and societal implications. By balancing innovation with responsibility, agentic AI has the potential to revolutionize industries while ensuring safety, fairness, and transparency.

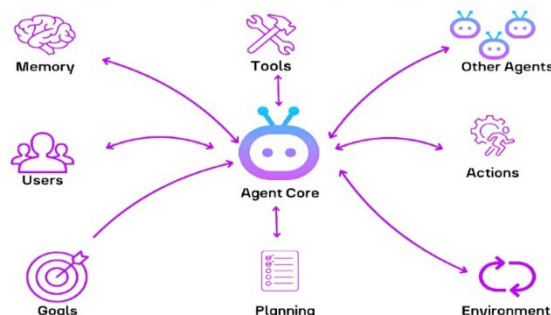
Key Functions of Microsoft Agents

Task Automation: Microsoft agents can automate repetitive tasks, such as submitting reports, updating databases, and managing schedules, allowing users to focus on more strategic activities.

Information Retrieval: They can query various systems, such as HR or CRM databases, to retrieve relevant information quickly, Collaboration and Communication enhancing decision-making processes.

Collaboration and Communication: Agents facilitate meetings, take notes, and summarize discussions, helping teams stay aligned and informed.

Data Analysis: Specialized agents, like the Analyst agent, can transform complex data into clear insights and visualizations, enabling informed decision-making.





Customizability: Users can create and modify agents tailored to their specific business needs using tools like Copilot Studio, which allows for low-code development.

Examples of Microsoft Agents

- **Researcher Agent:** Assists in synthesizing information and brainstorming ideas for research tasks.
- **Sales Agent:** Automates lead research and customer outreach to grow sales pipelines.
- **Interpreter Agent:** Provides real-time speech-to-speech interpretation in meetings, supporting multiple languages.



Microsoft agents represent a significant advancement in how organizations can leverage AI to enhance productivity and streamline workflows. By integrating these agents into everyday applications, Microsoft aims to transform the way individuals and teams work, making processes more efficient and effective.

Why use Agents?

Businesses should consider using **agents in Copilot** because they provide a powerful way to automate and streamline complex workflows. Here are some key reasons:

- 1. Task Automation** – Agents can handle repetitive tasks like data entry, report generation, or scheduling, freeing up employees to focus on higher-value work.
- 2. Context-Aware Assistance** – Unlike simple bots, Copilot agents can access business data (CRM, ERP, documents) and provide **contextual answers** tailored to your organization's processes.
- 3. Scalability** – Agents can manage multiple requests simultaneously, making them ideal for customer support, internal help desks, and operational tasks without adding headcount.
- 4. Integration Across Systems** – They can connect with tools like **Microsoft 365, Teams, Dynamics, and third-party apps**, creating seamless workflows across platforms.



5. Personalization – Agents can be customized for specific roles—like HR onboarding, IT troubleshooting, or sales enablement—so each department gets targeted support.

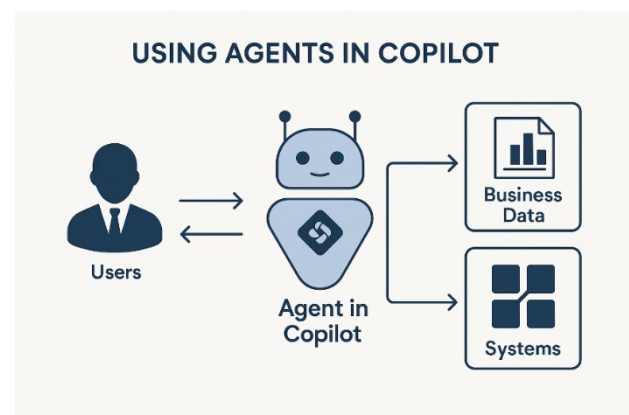
6. Cost Efficiency – By reducing manual work and improving accuracy, agents help lower operational costs and minimize errors.

7. 24/7 Availability – Agents can operate round-the-clock, ensuring continuous support for global teams and customers.

AI Agents are intelligent, task-oriented systems that automate processes, integrate data, and provide real-time decision support.

They act as **virtual assistants** for specialized tasks, such as gathering research, analyzing complex datasets, or guiding employees through workflows. By streamlining repetitive work, connecting multiple systems, and delivering actionable insights, agents help organizations save time, reduce errors, and improve efficiency.

Here's a visual showing how agents fit into a business workflow:



- Users interact with the Agent in Copilot.
- The agent connects to business data (documents, CRM, ERP) and systems (Microsoft 365 apps, third-party tools).
- This creates a loop where the agent automates tasks, retrieves context, and delivers actionable outputs back to users.

Copilot vs Copilot Agent

Copilot is an AI-powered assistant designed to help users complete tasks by providing intelligent suggestions, answering questions, and integrating with apps like Microsoft 365. It works interactively, responding to prompts and enhancing productivity within familiar tools such as Word, Excel, and Teams. In contrast, a **Copilot Agent** goes beyond simple assistance by acting as an autonomous, task-oriented entity that can execute multi-step workflows without constant user input.



Agents are customizable, context-aware, and can connect to business systems and data sources, enabling them to handle complex processes like onboarding, report generation, or customer support at scale. Essentially, Copilot is your smart helper, while Copilot Agents are specialized, automated workers embedded in your business ecosystem.

Feature	Microsoft Copilot	Copilot Agent
Purpose	General-purpose AI assistant for Microsoft 365 apps	Custom-built AI assistant tailored to your business workflows
Customization	Limited (predefined capabilities)	Fully customizable with topics, triggers, and actions
Integration	Works within Microsoft 365 apps (Word, Excel, Teams)	Connects to M365 + external systems via APIs, Power Automate
Actions	Suggests steps, provides answers	Executes workflows (e.g., create records, send notifications)
Context Awareness	Basic (document or app context)	Deep context (remembers user preferences, past interactions)
Development	No development required	Built in Copilot Studio (low-code environment)
Governance	Microsoft-managed	Enterprise-controlled (security, compliance, RBAC)
Use Cases	Drafting content, summarizing emails, analyzing data	Automating business processes, handling FAQs, integrating systems

In short:

- **Copilot** = Great for personal productivity inside Microsoft apps.
- **Copilot Agent** = Ideal for **business-specific automation and integration**.



Types of Agents

Declarative Agents: These agents are crafted using natural language instructions, integrating custom knowledge and skills. They operate within the Microsoft 365 Copilot environment, leveraging connectors and plugins to enhance

Custom Engine Agents: Developed using custom foundation models and orchestrators, these agents cater to specific enterprise needs and function as standalone Teams.

The key difference between **Microsoft 365 Declarative Agents** and **Microsoft Copilot Custom Engine Agents** lies in how you define their behavior, how they integrate with data and tools, and their intended use cases.

Declarative agents are Low-code/no-code whereas Custom agents are typically Full-code or advanced low-code. Similarly, declarative agents are for Business users, IT admins and Custom agents are for Developers, advanced users.

Examples of Agents

Here are **real-world examples of Copilot Agents for major departments in a company**:

1. Human Resources (HR)

Agent Name: *Onboarding Assistant*

Use Case: Automates new employee onboarding.

Example Workflow:

- Sends welcome emails and required forms.
- Creates accounts in Microsoft 365 and Teams.
- Schedules orientation sessions and training.

Impact: Reduces manual HR workload and ensures consistent onboarding experience.



Prompt Examples:

- *"Create a welcome email for a new hire starting next Monday, including links to the employee handbook and training schedule."*
- *"Generate a checklist for onboarding a remote employee in the Marketing department."*

2. Finance

Agent Name: *Expense & Compliance Agent*

Use Case: Handles expense report approvals and compliance checks.

Example Workflow:

- Reviews submitted expense reports against company policy.
- Flags anomalies or policy violations.
- Generates monthly financial summaries for leadership.

Impact: Improves accuracy and speeds up reimbursement cycles.

Prompt Examples:

- *"Review this expense report for policy compliance and flag any violations."*
- *"Summarize all approved expenses for November and create a chart for leadership."*

3. Sales

Agent Name: *Proposal Generator Agent*

Use Case: Creates tailored sales proposals using CRM data.

Example Workflow:

- Pulls client details from Dynamics 365.
- Generates a proposal in Word or PowerPoint with pricing and terms.
- Sends draft for approval and tracks status.

Impact: Cuts proposal creation time from hours to minutes.

Prompt Examples:

- *"Draft a sales proposal for ABC Corp using their CRM data and include a pricing table for premium services."*



- *“Create a PowerPoint presentation for a client pitch based on last quarter’s performance metrics.”*

4. IT

Agent Name: *Help Desk Agent*

Use Case: Provides automated IT support.

Example Workflow:

- Answers common troubleshooting questions.
- Resets passwords and manages access requests.
- Escalates complex issues to technicians.

Impact: Reduces ticket volume and improves response time.

Prompt Examples:

- *“Reset the password for John Smith and send confirmation to his email.”*
- *“Provide troubleshooting steps for Teams not syncing on desktop.”*

5. Marketing

Agent Name: *Campaign Planner Agent*

Use Case: Plans and schedules marketing campaigns.

Example Workflow:

- Suggests campaign ideas based on analytics.
- Creates social media posts and schedules them.
- Tracks engagement metrics and reports performance.

Impact: Streamlines campaign execution and reporting.

Prompt Examples:

- *“Plan a 30-day social media campaign for our new product launch and schedule posts for LinkedIn and Instagram.”*
- *“Generate a performance report for last month’s email campaign with open and click-through rates.”*



6. Operations

Agent Name: *Inventory & Supply Chain Agent*

Use Case: Monitors inventory and automates reordering.

Example Workflow:

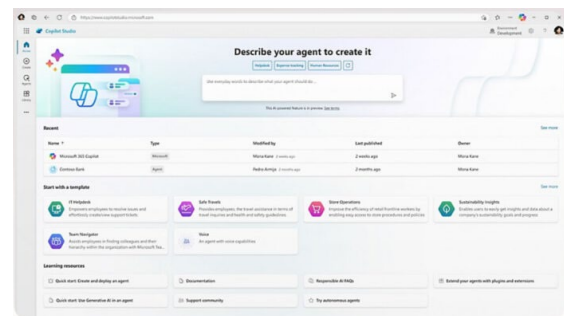
- Tracks stock levels in real time.
 - Generates purchase orders when thresholds are met.
 - Updates dashboards for supply chain managers.
- Impact:** Prevents stockouts and optimizes procurement.

Prompt Examples:

- *"Check current inventory levels for Product A and create a reorder request if stock is below 500 units."*
- *"Generate a weekly supply chain dashboard showing delivery times and pending orders."*

Agent Templates

Agent templates are **pre-built frameworks in Microsoft Copilot Studio** that make it easy to create AI agents without starting from scratch. They provide a starting point with predefined logic, capabilities, and workflows tailored for common business scenarios.



[Agent templates and examples for Microsoft 365 Copilot – Microsoft Adoption](#)

Template AI agents are pre-programmed AI systems that are designed to perform specific tasks in the least number of steps. The templates work as a customizable foundation that can be rapidly implemented even without extensive programming knowledge.

There are templates for AI agents that can help with customer support, content generation, or even data analysis. These templates can easily be adapted according to a user's workflow, ensuring that their operations are carried out swiftly and efficiently.



What They Include

- **Core functionality** (e.g., research, analysis, coaching)
- **Pre-configured prompts and actions**
- **Integration options** for Microsoft 365 apps like Teams, SharePoint, and Power BI

Examples of Agent Templates

- **Research Agent** – Designed to gather, summarize, and synthesize information from multiple sources.
- **Analyst Agent** – Optimized for advanced data analysis, trend detection, and generating insights.
- **Coaching Agent** – Provides personalized guidance and training for employees.
- **Insight Agent** – Interprets operational data and creates dashboards or reports.

Why Use Templates?

- **Faster Deployment:** No need to build logic from scratch.
- **Consistency:** Standardized workflows and best practices.
- **Customization:** You can modify templates to fit your organization's needs.

Use Templates to Create an Agent

[Explore agents](#)

To create an agent from a template:

1. On the **Describe** tab, select a template. You can test the agent in the right pane right away.
2. Using natural language, provide additional information to update and enhance the agent, including the agent name, description, and instructions.
3. On the **Configure** tab, add an icon, knowledge sources, and capabilities to your agent.

You can also configure the agent directly on the **Configure** tab:

1. On the **Configure** tab, select a template from the dropdown in the **Template** field.



2. The agent icon, name, description, instructions, and starter prompts are prepopulated. Update any of the fields to meet your scenario.
3. Add any knowledge sources and capabilities to enhance your agent.

The **Describe** and **Configure** tabs are in sync. You can switch between both tabs based on your preferences to author your agent.

Changes that you make to the agent are saved automatically. When you're satisfied with your agent's behavior and content, choose **Create** on the top right corner of the tool to create your agent.

After the agent is created, choose **Go to agent** in Copilot to chat with the agent. You can return to your agent from the left navigation pane in Copilot.

All Agents

[All agents](#)

The Agent Store is a centralized platform within Microsoft 365 Copilot that allows users to explore, install, and share various intelligent agents designed to automate tasks and improve efficiency in everyday work. It is not limited to agents developed by Microsoft but also includes creations from trusted partners and collaborative solutions generated by customers. The Agent Store is fully integrated into the Microsoft 365 Copilot interface, providing a seamless experience for users to discover and engage with agents tailored to their specific needs.

Agent Store in Copilot

The Agent Store offers immersive experience within Microsoft 365 Copilot that enables users to browse, install, and try agents tailored to their needs. It provides:

- Agents from Microsoft, trusted partners, and customers
- Personalized discovery based on user activities and profiles
- Seamless integration across Microsoft 365 products including Teams and m365copilot.com
- Support for both Microsoft 365 Copilot licensed customers and unlicensed customers

This is more than just a marketplace—it's a centralized platform where users can discover powerful tools to enhance productivity and streamline their workflows.



Agent Store

Find agents with the expertise to help you complete complex tasks

Built by Microsoft



Prompt Coach

Write and improve your prompts



Writing Coach

Take your writing to the next level with Writing Coach



Idea Coach

Plan and navigate the brainstorming process



Career Coach

Elevate your career with Career Coach



Learning Coach

Unlock your potential with Learning Coach



Surveys

Surveys agent automates survey creation, distribution, and analysis.



Workflows Agent (Front...

Build workflows with natural language, no code needed.



Microsoft 365 Admin

Use AI to help you manage Microsoft 365.



Skills (Frontier)

Find experts, areas to upskill, and more



Create an agent

Add custom knowledge and skills to your agent with Copilot Studio.

AI-generated content may be incorrect

Create an Agent

In the context of Microsoft agents, the "Describe" tab is used for building agents when your Microsoft 365 language supports it, allowing for a rich authoring experience. In contrast, the "Create" tab is used when the "Describe" tab is not supported in your preferred language, enabling you to configure your agent through the Configure tab.



New agent

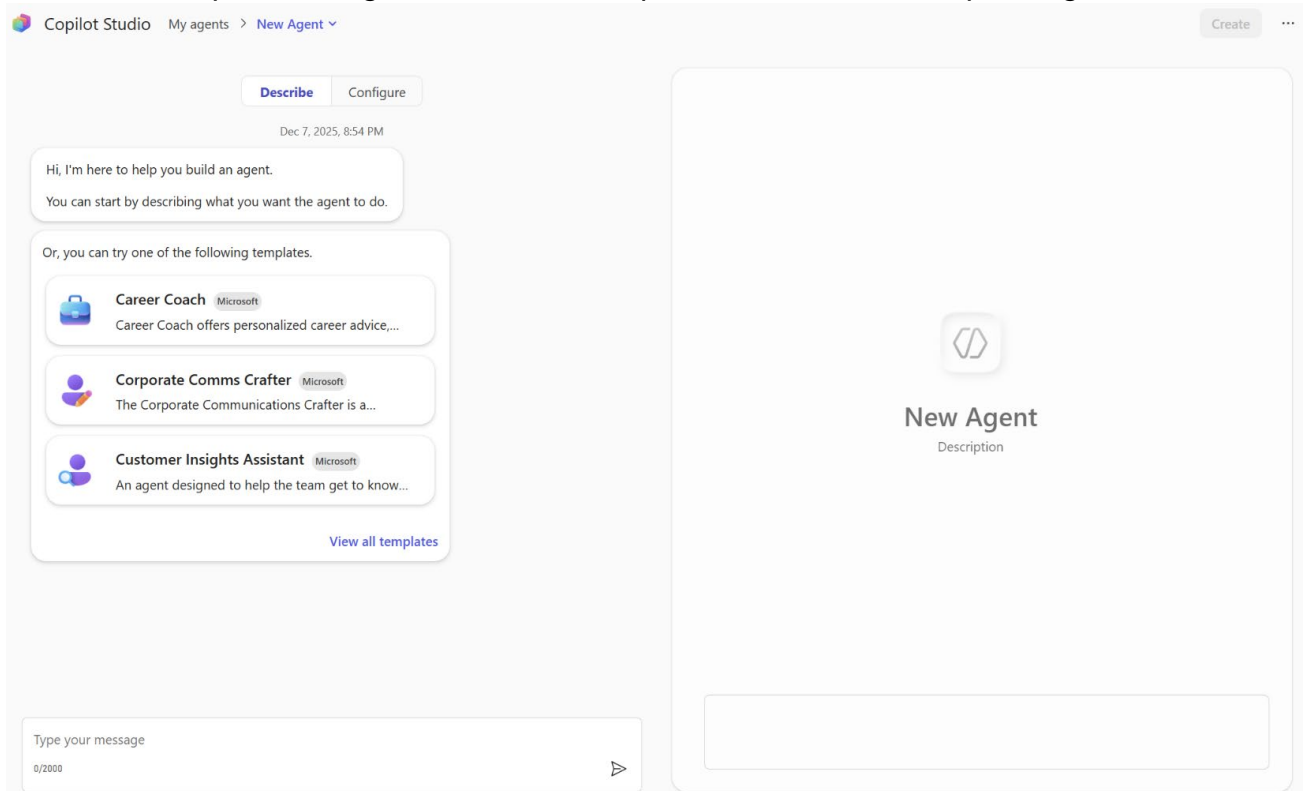
Additionally, Microsoft offers two types of agents: declarative agents, which utilize Microsoft Copilot's prebuilt infrastructure, and custom engine agents, which allow for more tailored solutions.

**To create an agent from a template:**

1. On the **Describe** tab, select a template. You can test the agent in the right pane right away.
2. Using natural language, provide additional information to update and enhance the agent, including the agent name, description, and instructions.
3. On the **Configure** tab, add an icon, knowledge sources, and capabilities to your agent.

You can also configure the agent directly on the **Configure** tab:

1. On the **Configure** tab, select a template from the dropdown in the **Template** field.
2. The agent icon, name, description, instructions, and starter prompts are prepopulated. Update any of the fields to meet your scenario.
3. Add any knowledge sources and capabilities to enhance your agent.



The **Describe** and **Configure** tabs are in sync. You can switch between both tabs based on your preferences to author your agent.



Changes that you make to the agent are saved automatically. When you're satisfied with your agent's behavior and content, choose **Create** on the top right corner of the tool to create your agent.

After the agent is created, choose **Go to agent** in Copilot to chat with the agent. You can return to your agent from the left navigation pane in Copilot.

Researcher and Analyst Agents

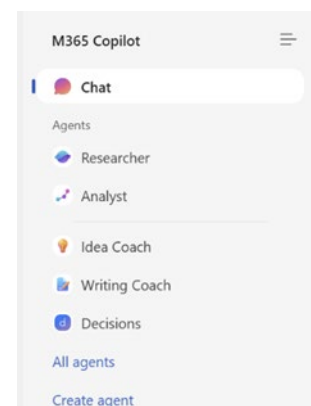
Businesses are under increasing pressure to do more with less; less time, fewer resources, and leaner teams. That's where Microsoft 365 Copilot agents come in handy.

Think of them as your smart digital teammates, ones that reduce cognitive load by combining skills, reasoning, and action, so you can focus on growing your business, not chasing down data or writing reports.

Researcher and **Analyst** are prebuilt agents that were created to help you save time, work smarter, and make better decisions. These agents are currently available as part of the [Frontier program](#), a new way customers with Copilot licenses can try out the latest agent innovations and provide feedback before these experiences are made generally available.

How to use the Agents

1. **Sign In:** Log into your Microsoft 365 account at microsoft365.com using your work or school credentials. Ensure you see your name and picture at the bottom left corner of the screen.
2. **Access the Analyst Agent:** Open Microsoft 365 Copilot and navigate to the Agents section in the left navigation pane. Select Analyst from the list of available agents.
3. **Ask Questions:** Enter a question about the data you want to analyze. The Analyst agent can handle various queries, such as identifying trends, calculating statistics, or summarizing data insights. For example, you might ask, "What are the sales trends for the last quarter?"





4. **Attach Data Files:** To provide the Analyst agent with the necessary data, click the + icon and select Attach content. You can upload files from your device or choose files from OneDrive or other cloud storage options. The agent can analyze data from Excel spreadsheets, CSV files, and more.
5. **Receive Insights:** After processing your request, the Analyst agent will generate a report in easy-to-read language, complete with visuals like charts and tables to help you understand the data better.

Researcher Agent

The **Researcher Agent template** in Microsoft Copilot Studio is designed to help users perform **complex, multi-step research tasks quickly and efficiently**.

Here's what it does and how it works:



Researcher

With Researcher, now every employee has access to expertis...

- The Researcher template acts as an AI-powered assistant for gathering, synthesizing, and summarizing information from multiple sources.
- It's ideal for tasks that traditionally require hours of manual effort, such as compiling industry reports, regulatory research, or competitive analysis.

Researcher is like having a full-time assistant who's great at digging up the information you need. Researcher helps you tackle complex, multi-step research at work—delivering insights with greater quality and accuracy than previously possible.

Whether you're checking out a new market, looking into competitors, or preparing for a big pitch, this agent can:

- Search your files and online sources to find insights that matter.
- Summarize what it finds in plain, easy-to-read language.
- Spot trends and opportunities that could make a difference for you.

Instead of spending hours trying to gather this information yourself, you'll get a tailored summary that's ready to roll. For example, you need new ideas to promote your new product line, but you don't know where to begin. Simply lean on Researcher to highlight the biggest trends currently in online marketing for small businesses. Easy enough, right?



Use Researcher to provide deep and well-sourced summaries on topics that can fuel your business.



Researcher (Frontier)

I see you want me to summarize the top three trends in SMB digital marketing for 2025 and compare them to last year's trends.

To make sure I understand your request:

- Are you looking for a detailed report or a brief summary?
- Do you have any specific sources or types of data you want included?
- Is there a particular format you prefer for the comparison?

If you'd like me to proceed, tell me to "go ahead" and I'll use my best judgement.

Before it begins, Researcher asks a few clarifying questions to help narrow and refine the direction of my original prompt. Great thinking, Researcher.

Researcher (Frontier)

Beginning research...
Starting to pull together relevant sources

After I add some additional guidance, away Researcher goes...

Researcher returns with a high-level description of the key digital marketing trends and changes from last year to this year.

Researcher returns a summary showing a progression of trends including **AI &**

Automation, Short-Form Video, and Personalization & Data that gained

Trend	2024 (Last Year)	2025 (Current Year)
AI & Automation	AI-driven marketing took off – SMBs started using AI to personalize campaigns, optimize ads, and automate customer interactions 2. This reshaped the customer journey in 2024, making	AI integration deepens – AI and machine learning became even more embedded in 2025 3. Many SMBs now leverage generative AI tools for content creation, data analysis, and chatbots, automating



momentum in 2024 that have become even more influential in 2025. In a matter of moments, I've got a great foundation to further build out my plans.

How to Use Researcher Agents

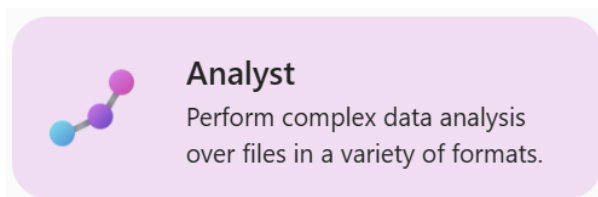
1. **Open Microsoft Copilot Studio** and select **Create Agent**.
2. Choose the **Researcher template**.
3. **Define your research goal** (e.g., "Summarize latest EPA compliance standards").
4. **Add data sources**: Upload documents, link SharePoint folders, or connect APIs.
5. Configure **output format** (summary, detailed report, bullet points).
6. **Test the agent** with a sample query.
7. **Deploy** to Teams or SharePoint for easy access.

Analyst Agent

This agent excels at **technical analysis**, **data modeling**, and **structured reasoning**, making it perfect for engineering, finance, and operations teams.

Capabilities for Businesses

- Perform **decline curve analysis** for well performance
- Model **break-even pricing** for new drilling projects
- Analyze **pipeline throughput** and bottlenecks
- Evaluate **financial scenarios** for acquisitions or divestitures



Turn raw data into decisions with Analyst

If spreadsheets make your head spin, **Analyst** is here to help. This powerful agent is great at digging into your data and making sense of it all, going from raw data to insights in no time. Analyst thinks like a skilled data scientist, taking as many steps as necessary to refine its reasoning and provide a high-quality answer. Here's a sample of what it can do:

- Analyze sales, customer, or financial data to find what's working and what's not.

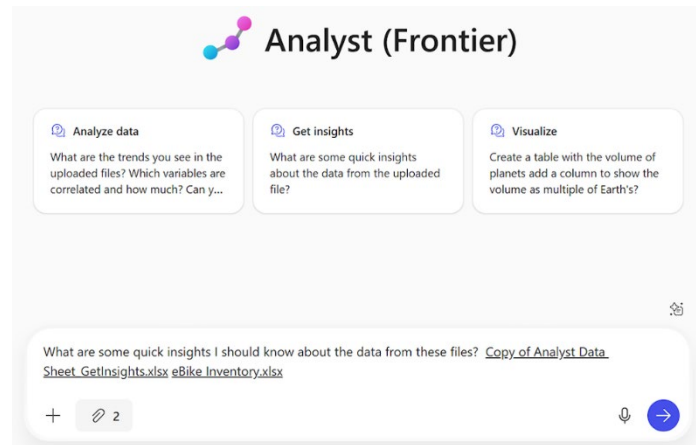


- Spot patterns or problems you might have missed.
- Create simple charts and summaries that explain the story behind the numbers.
- Even suggest what you should do next based on the trends it finds.

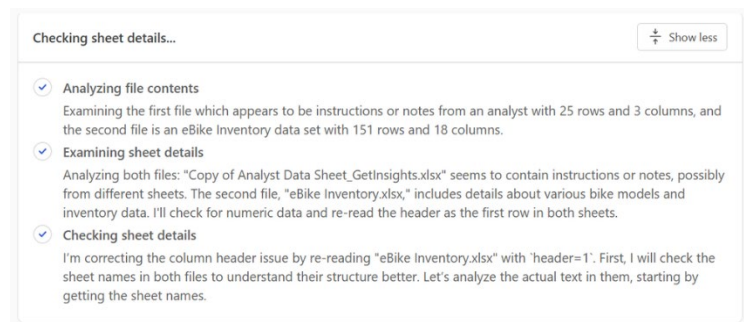
For instance, you could ask it for insights on spreadsheets containing inventory, sales, customer data and reviews to determine which products were performing well and which weren't.

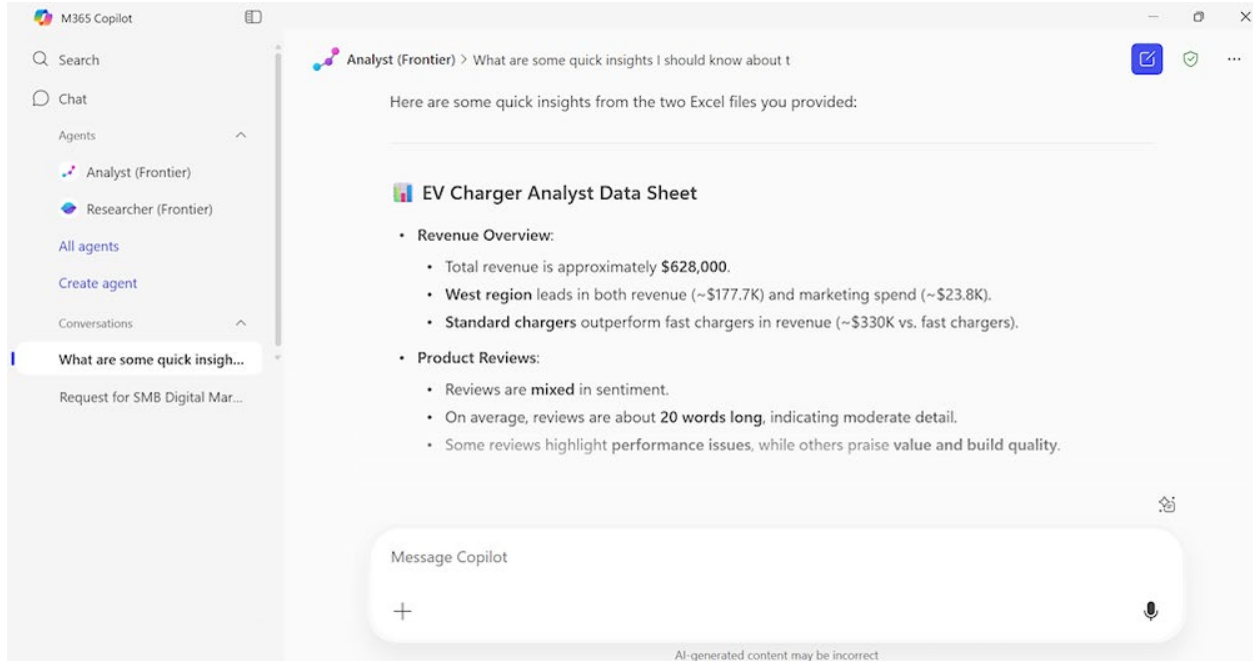
Analyst can provide clear answers, saving time AND headaches.

Upload or point Analyst to data such as Excel files and ask it to pull together insights you should know.

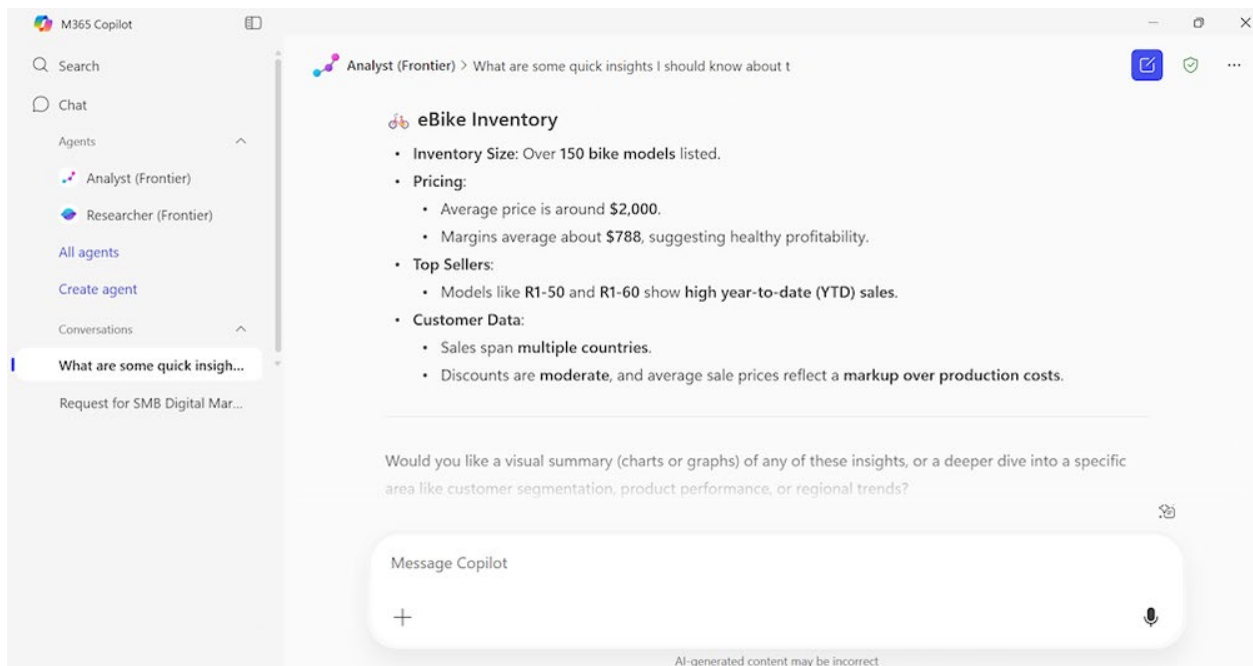


Analyst lets you in on its thinking and processes, letting you know step-by-step how it's approaching the task.





Analyst returns insights that help me understand the drivers of revenue and customer sentiment.



Analyst also returns insights on our eBikes, featuring call-outs for inventory, pricing, top sellers, and customer data. Analyst also asks if I'd like any charts or graphs of the data to accompany the analysis. That's a great suggestion, Analyst.



Even for those that are skilled with numbers, Analyst can save so much time, standardizing data, identifying outliers, and performing a wide range of computations to get to insights you can use to make informed decisions.

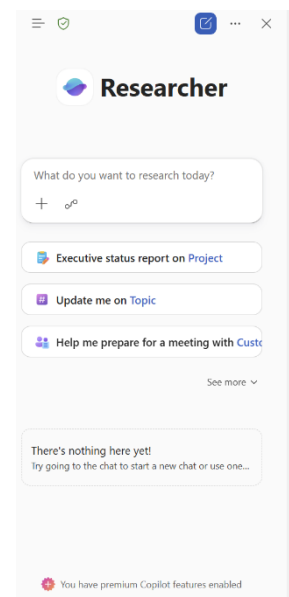
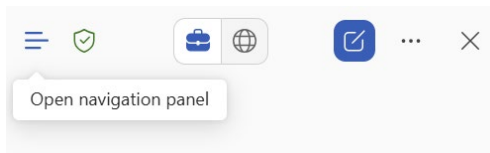
How to Use the Analyst Agents

1. **Select reasoning effort:** Use high for complex financial modeling.
2. **Input structured data:** CAPEX, OPEX, production forecasts.
3. **Run analysis:** Use Python or Excel integration for outputs.
4. **Review results:** Get tabular outputs with sensitivity analysis.

Use an Agent in Apps

You can use Agents directly in specific apps like Word, Excel, etc.

1. Open the app, then open Copilot from the Home tab of the ribbon.
2. At the top left of the Copilot pane, click the icon for the navigation pane.
3. Click the name of the Agent you want to use.
4. It will open the Agent and now when you chat it will utilize that Agent.



You can also use some Agents from the Copilot Chat by clicking on the Tools icon, then choose the Agent from the list.

Remove an Agent

Steps to Remove an Agent

1. **Sign in to Copilot Studio**
 - Go to Copilot Studio and log in with your Microsoft 365 credentials.
2. **Navigate to Agents**
 - In the left navigation pane, select **Agents**.
 - You'll see a list of all agents created in your environment.



3. **Select the Agent**

- Find the agent you want to remove.
- Click on its name to open the details page.

4. **Delete the Agent**

- In the top-right corner, click **More options (:)** or **Settings**.
- Choose **Delete**.
- Confirm the deletion when prompted.

What's New in Agents

Frontier Firms

The future of work will be shaped by Frontier Firms—organizations that are human-led and agent-operated. These companies are reshaping how work gets done, empowering every employee with an AI assistant, amplifying impact with human-agent teamwork, and reinventing business processes with agents.

Agent Mode in Microsoft 365 enhances productivity by allowing users to interact with AI agents in Word, Excel, and PowerPoint to create, edit, and analyze documents seamlessly.

Getting Started with Agent Mode

1. **Access Requirements:** To use Agent Mode, you need a Microsoft 365 subscription, specifically the Copilot feature. This is available for both business and individual subscribers. For business users, a Microsoft 365 Copilot business subscription is typically required, while individual users can use a Microsoft 365 Family or Personal plan.
2. **Enable Agent Mode:**
 - For Excel: You may need to install the Excel Labs add-in to access Agent Mode. Once installed, you can choose Agent Mode from the add-in options.
 - For Word: Agent Mode is integrated directly into the web version of Word, allowing you to start using it without additional installations.



Using Agent Mode in Applications

- **In Excel:** You can prompt the AI to perform complex tasks such as analyzing data, generating charts, or creating financial reports. For example, you might say, “Run a full analysis on this sales data set and visualize the results.” The AI will then create the necessary formulas, generate visualizations, and summarize key insights.
- **In Word:** You can ask the AI to draft documents, summarize reports, or format text. For instance, you could prompt, “Summarize this report and add suggestions.” The AI will draft the content and ask follow-up questions to refine the output.
- **In PowerPoint:** While the full Agent Mode for PowerPoint is coming soon, you can currently use the Office Agent in Copilot chat to create presentations based on your requests. For example, you might say, “Create a slide deck about Q3 marketing strategy,” and the AI will generate the slides for you.

Benefits of Using Agent Mode

- **Enhanced Productivity:** Agent Mode transforms traditional office tasks into interactive experiences, allowing users to collaborate with AI in real-time, making it easier to handle complex tasks without needing extensive expertise.
- **User Friendly:** It democratizes access to advanced features in Excel and Word, enabling users with little to no experience in data analysis or document formatting to achieve professional results.

By leveraging Agent Mode in Microsoft 365, you can significantly streamline your workflow and enhance your productivity across various Office applications.



In Conclusion

Microsoft Copilot Agents represent a transformative leap in how organizations automate tasks, integrate systems, and enhance productivity. By leveraging customizable agents within Microsoft 365, businesses can streamline workflows, reduce manual effort, and ensure secure, scalable support for their teams. Whether you're deploying prebuilt templates or designing custom solutions in Copilot Studio, agents empower every employee to work smarter and focus on higher-value activities. As agentic AI continues to evolve, adopting these tools will position your organization at the forefront of innovation—driving efficiency, improving decision-making, and fostering a culture of continuous improvement. Embrace Copilot Agents to unlock new possibilities and shape the future of work in your organization.

Websites to Learn More

[Types of AI Agents and Their Use Cases | Microsoft Copilot](#)

[Copilot Agents: Use Cases by Company Department](#)

[How Do AI Agents Work? AI Explained | Microsoft Copilot](#)

[Anthropic joins the multi-model lineup in Microsoft Copilot Studio | Microsoft Copilot Blog](#)

[Bing Videos](#)

[Microsoft Copilot Agents Tutorial - Search Videos](#)

[Agents in Microsoft 365 - Microsoft Adoption](#)