

Automate, Assist, and Accelerate: Building and Using AI Agents in Microsoft 365 Copilot

Course Overview

As AI becomes more deeply embedded into the workplace, Microsoft 365 Agents offer a new level of automation and intelligence across daily tasks and workflows. Agents act as specialized assistants that can retrieve information, guide users, automate steps, and support decision-making, all based on natural language engagement.

In this session, you'll learn what agents are, when to use them, and how they integrate into Microsoft Copilot Chat and SharePoint. You'll explore prebuilt agents to understand their strengths and use cases and then walk through creating, testing, and managing your own custom agents. Through guided demonstrations and hands-on exercises, you'll gain practical skills to personalize and deploy agents in real workplace scenarios.

By the end of the session, you'll have a clear understanding of how to use agents for efficiency, consistency, and task automation, whether for personal productivity or broader organizational adoption.

Learning Outcomes

After completing this session, participants will be able to:

- Explain what Microsoft 365 Agents are and how they support work across Microsoft Copilot and SharePoint.
 - Identify who can create, use, and manage agents based on Microsoft 365 roles and permissions.
 - Utilize prebuilt agents such as Analyst, Researcher, Prompt Coach, Idea Coach, and Writing Coach to speed up common tasks.
 - Create custom agents in Copilot Chat and SharePoint using provided tools and templates.
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Agenda

1. Understanding Microsoft 365 Agents

Begin with the fundamentals of what agents are, how they operate, and the value they add across everyday tasks. This section explains the core concept of agents as AI-powered assistants that can navigate information, automate repetitive activities, and support decision-making.

Key topics include:

- What agents are and where they show up in Microsoft 365
 - The benefits of agents for productivity, support, and workflow consistency
 - How agents enhance collaboration and support users across shared workspaces
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2. Exploring Prebuilt Microsoft 365 Copilot Agents

This segment highlights how built-in agents can be used immediately without development. Participants will see how each prebuilt agent supports a different type of user need, from analysis to ideation to writing refinement.

Highlighted agents include:

- **Analyst Agent:** Summarizes, compares, and interprets quantitative information
- **Researcher Agent:** Retrieves facts, structured insights, and referenced context
- **Prompt Coach Agent:** Helps refine prompt quality for better outcomes
- **Idea Coach Agent:** Assists with brainstorming, creative thinking, and scenario generation
- **Writing Coach Agent:** Improves clarity, tone, structure, and grammar

Hands-On – Use the Prompt Coach agent to refine and improve a prompt.

3. Building and Managing Custom Agents

This section demonstrates how to design and deploy agents tailored to teams, departments, or unique workflows. You'll walk through the tools used to configure agents, the components that define their behavior, and the process for testing and improving them over time.

Key activities include:

- Exploring required tools and configuration options
- Defining agent purpose, capabilities, and context

- Building and refining a Copilot Chat agent in two stages
- Creating a SharePoint-based agent for contextual knowledge support

Optional Hands-On – Create a SharePoint agent using documents as a knowledge source.