

Copilot for Microsoft 365 AI-Agents Workshop.

The workshop provides business and IT decision-makers with a clear, practical understanding of **Microsoft Agents**, their role within Microsoft 365 Copilot, and their value for automation, knowledge management, and process optimization.

Participants learn the differences between **Agents, Copilot, Copilot Studio, Workflows, and traditional automation** approaches, and identify concrete use cases for their own organization. The concept is based, among other things, on Microsoft's Agent ecosystem, including **existing standard agents (Researcher, Analyst, Facilitator, etc.), custom agents built via Copilot Studio**, as well as relevant governance, security, and cost-control mechanisms.

1. Target Audience

The workshop is designed for the following roles:

- **IT Leadership & Enterprise Architects**
(Architecture, security, governance, integration)
- **Business Unit Leaders**
(Assessment of business value and efficiency potential)
- **Digitalization & Automation Leads**
- **M365 / Power Platform Owners**
- **Security & Compliance Officers**
(Data access, DLP, labels, permissions)
- **Project Managers / Product Owners**
(Piloting, rollout, governance)

The target audience includes all key stakeholders for agent adoption, automation initiatives, and Copilot projects, forming the foundation for organization-wide aligned decision-making.

2. Workshop Objectives

Business / Strategic

- Understand the role of Microsoft Agents within the Microsoft 365 ecosystem.
- Evaluate the business potential of standard and custom agents (e.g., Researcher, Analyst, Facilitator).
- Identify relevant business use cases for the organization.

Technical

- Position Copilot, Copilot Studio, Agent Builder, and Workflows.
- Gain an overview of architecture, security, data access, permissions, and management capabilities (including agent inventory, access controls, sensitivity labels, DLP).

Operational

- Define concrete steps for piloting, cost control, and governance (e.g., agent lifecycle management, cost monitoring, rollout strategies).

3. Workshop-Format

- **Duration:** 1 day
(or alternatively a condensed ½-day version)
- **Delivery:** On-site, remote, or hybrid
- **Interactive Elements:**
 - Live demos of Agents and Copilot Studio
 - Use case session
 - Whiteboard collaboration (Teams Whiteboard)
 - Q&A discussion round

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4. Topics

- **Fundamentals:**
 - Introduction to Microsoft Agents
 - Positioning within the Microsoft AI portfolio
 - Technology overview & demo
- **Business Use Cases & Real-World Examples**
- **Prerequisites & Governance**
(Role model, policies, control mechanisms)
- **Interactive Use Case Workshop**
- **Recommendations & Next Steps**

5. Deliverables

After the workshop, the customer receives:

- **A documented summary** of all insights
- **A prioritized use case list**
- **Technical and organizational prerequisites**
- **A recommendation for piloting**
- **A roadmap for next steps** (architecture, PoC, scaling)

6. Conditions & Prerequisites

- Existing Microsoft 365 environment
(including relevant permissions)
- Willingness to adopt automation and AI
- Access to relevant admin and agent management functions
- Willingness to conduct governance and security assessments

Interested?

Our team looks forward to advising you.
Contact us: microsoft.ch@bechtel.com

