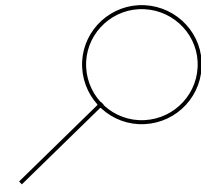




Adoption & change management playbook **Microsoft 365 Copilot agents**



Playbook overview

Purpose

To offer practical guidance on how to drive Adoption and Change Management (ACM) for Microsoft 365 Copilot agents. It provides actionable steps and checklists to support the people side of change and enable long-term adoption of Copilot agentic solutions.

Audience

Anyone who is responsible for leading a Copilot agentic change initiative, including business process leaders, IT administrators, or change managers.

What's covered

- Overall ACM approach for Copilot
- Key differences between ACM for Copilot vs. Copilot agents
- Detailed objectives, activities, and outcomes related to ACM for each phase of the implementation framework
- Resources for additional support

We encourage you to explore the links that are provided throughout this playbook to access more detailed guidance on how to implement each ACM step for M365 Copilot agents.



Adoption & change management for Copilot



Plan

Ensure strategic alignment, readiness, stakeholder engagement, and success metrics for Copilot implementation



Implement

Launch Copilot through targeted communications, hands-on training, and active stakeholder engagement to drive usage



Adopt

Engage employees to use Copilot over time as part of their normal ways of working



Manage

Monitor success metrics, gather feedback over time, and support employees to foster long-term adoption



Improve

Evaluate trends, learn from experience, implement enhancements, and plan for the next iteration of Copilot implementation

What is different for agent ACM?



Plan

Implement

Adopt

Manage

Improve

		Copilot Agents	Copilot
PLAN	Primary goal	Transform business processes	Empower individual productivity
	Scope of change	Organizational workflows and processes	Individual-level behavior and work habits
	Key stakeholders & impact	Employees in targeted processes: Use the agent for specific tasks Business process owners: Implement new process and manage change; define and track success metrics Business decision makers: Sponsor process transformation; strategize how to reorganize how work gets done to leverage efficiencies and achieve goals IT: Build and manage the agent's lifecycle	All employees: Use Copilot in day-to-day work Business decision makers: Align Copilot with productivity goals IT: Configure and deploy Copilot
	Success metrics	- Agent usage adoption - Process efficiency improvements and ROI - Business outcome metrics and KPIs	- Copilot usage and feature adoption rates - Productivity gains - Employee engagement and sentiment toward Copilot

What is different for agent ACM?

									
Plan		Implement		Adopt		Manage		Improve	
		Copilot Agents				M365 Copilot			
IMPLEMENT	Training approach	- Focused on the agent and the business process that the agent supports - May vary by role, depending on responsibilities in the process				- General Copilot features and usage - Same content for most employees			
ADOPT	Center of Excellence (CoE) support	Build expertise in Copilot Studio/Power Platform for agent makers - Define agent design and publishing standards - Develop lifecycle management frameworks				- Drive organization-wide skilling - Enable self-service by providing best practices and instructional resources - Establish user communities (e.g., Copilot champions)			
MANAGE	Governance model	- Develop production environments, approval workflows, and permission policies - Oversee agent creation, ensure connectors/data sources meet compliance, and enforce lifecycle policies - Enforce protocols to avoid “agent sprawl”				- Governed via standard M365 controls with a focus on data security, permissions, and responsible use policies - Focus on enabling features for the <i>right</i> employees, monitoring usage, and ensuring compliance			
IMPROVE	Focus of expansion	- Broader usage of M365 Copilot agents; additional business processes - Progressing in maturity of becoming a Frontier Firm with agents joining teams as “digital colleagues” and employees becoming “agent bosses”				- Broader usage of M365 Copilot; license expansion for additional employees - Consider potential for agents / initiating journey toward becoming a Frontier Firm			



ACM by phase



Key objectives for the *Plan* phase

- Align Copilot agent solution to business priorities, ensuring the change delivers meaningful value
- Decide how you will measure success
- Engage stakeholders to build early buy-in and reduce resistance
- Prepare employees for the change, including seeking feedback, communication, and training

PLAN PHASE

Key actions

STEP 1. Align Copilot agent solution to strategic priorities

- ❑ **Align on strategic priorities.** Work with senior leaders to discuss the organization's strategic priorities and overall, AI vision. Align on priority areas to explore further for agentic solutions.
- ❑ **Identify & prioritize key scenarios.** Work with senior leaders and stakeholders to identify challenges in key focus areas, identify potential processes to incorporate an agent, and prioritize scenarios using a [prioritization matrix](#). Choose a scenario to pursue in designing an agentic solution, ensuring there is a strong “why” that is aligned to strategy.
- ❑ **Design the solution & process changes.** Work with leaders and process SMEs to [define the scenario](#) and map the current and future state process. Clarify what the agent will do vs. what employees will do. Identify key changes that will impact the day-to-day work of employees.

RESOURCES

- [Agent scenario prioritization matrix](#)
- [Agent solution envisioning template](#)



PLAN PHASE

Key actions, continued

STEP 2. Decide how you will measure success.

- ❑ **Define value metrics to monitor progress and adapt as needed.** Work with leaders to [build a business case for agents](#). [Identify where agents can drive value](#) (e.g., reduce operating costs, improve customer satisfaction, improve quality of deliverables) to achieving their goals. [Identify value metrics](#) to assess the extent to which the agent is making an impact.
- ❑ **Gather baseline metrics / data prior to implementing the change.** Capture current state metrics on the key outcomes that have been identified. Validate with stakeholders or business owners to ensure accuracy.

RESOURCES

- [Steps to build a business case for agents](#)
- [Identifying where agents can drive value](#)
- [AI value metrics continuum](#)



PLAN PHASE

Key actions, continued

STEP 3. Engage stakeholders to develop agent, get early buy -in, and reduce resistance.

- ❑ **Executive sponsorship.** Secure senior leaders and business owners to champion the new solution and communicate to the larger team how it supports broader goals.
- ❑ **Build a project team that represents key stakeholder groups.** Form a cross-functional project team to develop the solution and build buy-in (e.g., process experts to define requirements, technical experts to build the agent, change manager to support the team). Involve employees who will be using the agent in testing to ensure the agent's answers or actions are correct and aligned to business needs.
- ❑ **Consult with key stakeholders related to [data security, governance, and risk assessment](#).** Ensure the AI/agent governance board or CoE review the plan. Determine data sources the agent needs and ensure compliance (e.g., if connecting to sensitive HR data). Plan for any necessary controls (e.g., who can use the agent, approval steps for agent actions). Mitigate risks (e.g., identify fallback plan if the agent gives a wrong answer to a customer).
- ❑ **Involve IT and developers early to ensure technical readiness.** Set up a dev / testing environment where the agent will be built / tested without impacting production. Ensure makers have appropriate permissions (e.g., Copilot Studio, connectors). If needed, plan for integrations or connectors to external systems and involve the relevant system owners early.

RESOURCE: [Microsoft Learn: Microsoft 365 Copilot Agent Management Essentials](#)



PLAN PHASE

Key actions, continued

STEP 4. Prepare employees for the change.

- ❑ **Seek feedback and assess resistance.** Seek feedback and [potential concerns](#) from employees who will be impacted by the agent prior to implementation. Conduct [focus groups](#), [surveys](#), or discussions in regular team meetings. Follow up to address concerns, as necessary.
- ❑ **Evaluate impact.** Identify whose day-to-day work will be impacted by the agent. Assess the level and complexity of change for each affected role (e.g., roles, responsibilities, processes).
- ❑ **Develop communication, training, and change mitigation plans to support a smooth transition.** Prepare communications so employees are aware of the change, understand the why, and know how it will impact them individually. Plan training for employees to learn the new process and how to work with the agent. Update documentation (SOPs, process guides). Implement additional change mitigation plans to address areas of resistance or concern, as necessary.

RESOURCES

- [Addressing resistance to agent adoption](#)
- [Example focus group and survey questions to gather employee feedback on agents](#)



PLAN PHASE

Measuring success

By the end of the Plan phase, you should have...

- ...a Copilot agentic solution that is aligned to business priorities
- ...clearly defined success measures
- ...engaged key stakeholders (across functions / levels)
- ...begun to prepare employees for the Copilot agentic solution

EXAMPLE OUTPUTS

- ✓ Success criteria
- ✓ Stakeholder analysis and engagement plan
- ✓ Resistance assessment
- ✓ Change impact analysis and mitigation plans
- ✓ Communications and training plans



Key objectives for the *Implement* phase

- Pilot end-to-end solution
- Implement new process / agent to all employees in scope
- Launch communication and training plans to inform and enable employees
- Provide enhanced support structure to address initial technical or process issues
- Monitor usage and feedback immediately following implementation

IMPLEMENT PHASE

Key actions

STEP 1. Pilot the end-to-end solution, including the new process and agent, to ensure it works, address critical issues, build quick wins, and identify change champions.

- ❑ **Choose a small group to pilot.** Run a pilot of the new process / agent with a small group or in a controlled setting. Refine the solution, as necessary, based on outcomes and feedback.
- ❑ **Communicate quick wins.** Inform employees of any quick wins from the pilot to build confidence in the new solution.
- ❑ **Engage pilot participants as champions.** Leverage pilot participants to assist in communication, training, or gathering feedback from their coworkers.

STEP 2. Implement new process / agent to all in scope employees.

- ❑ **Ensure employees have access.** Ensure all targeted employees have the necessary permissions and licenses required to use the agent.
- ❑ **Deploy agent and initiate new process:** Align with key stakeholders on appropriate timing. Consider staggering the rollout (e.g., by location or department) so support can be focused on those groups.



IMPLEMENT PHASE

Key actions, continued

STEP 3. Launch communication and training plans to inform and enable employees.

- ❑ **Launch communications.** Engage leaders in communicating the new solution, reinforcing the reason, intended scope, and benefits. Ensure employees know the specific actions they are expected to take, resources available for support, and key points of contact.
- ❑ **Provide training or other enablement.** Provide hands-on training on the full solution, including agent and process. Provide quick reference guides or other documentation as resources.

STEP 4. Provide enhanced support structure to address initial technical or process issues.

- ❑ **Set up support resources and channel specifically for the launch.** Dedicate resources to quickly answer questions and triage issues. Establish escalation process to address issues and remove barriers. Inform employees of how to access this support.
- ❑ **Have a fallback plan.** Have a fallback plan (e.g., to a manual process or the previous process) if the new solution is causing too much disruption.



IMPLEMENT PHASE

Key actions, continued

STEP 5. Monitor usage and feedback immediately following implementation to assess progress and identify quick adjustments.

- ❑ **Monitor agent usage.** Ensure the agent is being used by employees and check if it is performing as expected.
- ❑ **Seek feedback.** Reach out to employees for their initial feedback. Leverage your early adopters and champions as feedback mechanisms.
- ❑ **Act quickly.** Consider having daily stand-ups with the project team to discuss any incidents or feedback and make decisions on quick amendments to the process that will address urgent issues.



IMPLEMENT PHASE

Measuring success

By the end of the Implement phase, you should have...

- ...piloted *and* implemented the new end-to-end agentic solution and process
- ...implemented communication and training plans
- ...provided enhanced support structure to address initial technical or process issues
- ...monitored initial usage and feedback

EXAMPLE OUTPUTS

- ✓ Early adopter / change champion networks
- ✓ Deployed agentic solution
- ✓ Adoption enablement assets (e.g., communications, training materials, informational resources)
- ✓ Hypercare support plan



Key objectives for the *Adopt* Phase

- Reinforce the agentic solution to drive adoption over time
- Seek and act on employee feedback

ADOPT PHASE

Key actions

STEP 1. Reinforce the agentic solution to drive adoption over time.

- ❑ **Demonstrate senior leader support.** Leadership should publicly support the new way of working so it becomes the normal way of working. Communicate how new agentic solutions are making a difference at the organizational level and how they fit into the organization's AI strategy. Share how senior leaders are using agentic solutions themselves.
- ❑ **Guide managers to reinforce change.** Managers should set expectations and hold employees accountable for using the new agentic solution, avoiding workarounds or going back to old ways of working. Include the new solution in team meeting agendas; report on progress and ask for feedback. Recognize those who embrace it to reinforce their actions and to encourage others.
- ❑ **Remind employees about available support.** Continue to communicate about available training, reference guides, or other resources. Consider offering refresher training or one-on-one coaching for areas that are struggling. Update your resources to address changes.
- ❑ **Create communities of practice.** If your organization is deploying multiple agents or planning more, create a community of practice or agent champions group (similar to Copilot champions). They can share experiences, gather feedback, identify issues, and build excitement around the AI solutions. This also prepares the organization to accept future agents more readily by building an AI-positive culture.



ADOPT PHASE

Key actions, continued

STEP 2. Seek and act on employee feedback.

- ❑ **Seek feedback from employees and stakeholders.** Seek feedback across stakeholder groups via surveys, regular team meetings, or focus group discussions. Pay attention to any areas where adoption is slower than expected.
- ❑ **Plan for some iterations after implementation.** Revise the process or agent based on performance or employee feedback. Prioritize those updates that can be done quickly and address key concerns.
- ❑ **Communicate that action has been taken.** Thank employees and share how you are using their feedback to gain their buy-in and reinforce their adoption.



ADOPT PHASE

Measuring success

By the end of the Adopt phase, you should have...

- ...reinforced the agentic solution through leader support, continued enablement, and communications
- ...obtained and acted on employee feedback

EXAMPLE OUTPUTS

- ✓ Communities of practice
- ✓ Established feedback mechanisms
- ✓ Remediation plans



Key objectives for the *Manage* phase

- Collect quantitative and qualitative data to demonstrate value or ROI of agentic solution
- Enact governance and performance monitoring protocols to ensure security, effectiveness, and maintain employee confidence in the solution
- Continue to communicate with employees to reinforce the change

MANAGE PHASE

Key actions

STEP 1. Collect quantitative and qualitative data to demonstrate value or ROI of agentic solution

- ❑ **Assess key metrics.** Refer to the success metrics you identified prior to implementation. Compare metrics prior to and after implementation. Use [Copilot Studio Agents Report](#) to evaluate agent usage frequencies, completion rates, error rates, etc.
- ❑ **Gather ongoing employee feedback.** Check how the employees feel about the new process after they have had more time to work with it.
- ❑ **Share value story with key stakeholders.** After a period of stable use, share the full value story of the agent with sponsors and key stakeholders to keep them updated, build advocacy, and inform future decision-making related to agentic solutions.

RESOURCES

- [Use the Copilot Studio Agents Report to identify actionable insights](#)
- [Microsoft Learn: Copilot Studio Agents Report](#)



MANAGE PHASE

Key actions, continued

STEP 2. Enact governance and performance monitoring protocols to ensure security, effectiveness, and maintain employee confidence in the solution.

- ❑ **Monitor compliance and control.** The Agent CoE or IT team should monitor that the agent remains compliant and controlled. Verify that no one is trying to misuse it or that it is not causing any unintended access to data.
- ❑ **Monitor technical performance.** Ensure the agent's performance does not degrade over time. Put in place monitoring alerts if available (e.g., if the agent calls a certain action too many times or fails often). This is part of reinforcing operational integrity.



MANAGE PHASE

Key actions, continued

STEP 3. Continue to communicate with employees to reinforce the change.

- ❑ **Provide progress updates.** Be transparent about how the agentic solution is performing compared to expectations. Engage them in efforts to improve in opportunity areas.
- ❑ **Celebrate success stories.** Share what is going well and how the new solution is adding value. Recognize individuals or teams who have leveraged the agentic solution effectively.
- ❑ **Reinforce the long-term vision for M365 Copilot and AI.** Remind employees about how this solution fits into the overall long-term vision for leveraging Copilot / AI to achieve the organization's strategy.



MANAGE PHASE

Measuring success

By the end of the Manage phase, you should have...

- ...collected data against success measures to demonstrate value or ROI of agentic solution
- ...implemented governance and performance monitoring protocols
- ...continued to communicate with employees to reinforce the change

EXAMPLE OUTPUTS

- ✓ ROI assessment
- ✓ Agentic solution value story
- ✓ Progress updates
- ✓ Success stories



Key objectives for the *Improve* phase

- Operationalize and sustain agentic solution to make the change stick over time
- Capture insights and scale to improve and expand agentic usage within the organization
- Embed AI into the organizational culture to foster AI-first behaviors, evolve organizational AI maturity, and embed patterns of becoming a Frontier Firm.

IMPROVE PHASE

Key actions

STEP 1. Operationalize and sustain agentic solution.

- ❑ **Operationalize agentic solution.** Move the agent from “project” to “ongoing operations.” Assign a clear owner (business process lead + IT/CoE support) for ongoing maintenance.
- ❑ **Define plan for updating / review.** Implement a schedule or criteria for updating the agent (e.g., changes in source systems, process policies, or technical features). Decide on a periodic review schedule to assess if the agent is still adding value or if major changes are needed.
- ❑ **Monitor adoption trends.** Monitor [agent resolution rates, satisfaction](#), and [trends over time](#) to identify actionable insights and opportunities for improvement. Refresh communications or other engagement methods, if needed to keep the agent visible.
- ❑ **Maintain training.** Maintain and update training to reflect any process or technical changes over time. Ensure any new employees entering a role that uses the agent is trained on it as part of their onboarding process.

RESOURCES

- [Use the Copilot Studio Agents Report to identify actionable insights](#)
- [Use agent trend data to identify opportunities for improvement over time](#)



IMPROVE PHASE

Key actions, continued

STEP 2. Capture insights and scale.

- ❑ **Conduct post-implementation review.** Document successes, challenges, and lessons learned for future projects or iterations of the agentic solution. Consider insights related to process, technical, and change management factors.
- ❑ **Identify next opportunities for agentic solutions.** Use insights to justify scaling existing agents or investing in new ones. Identify new processes or teams for agent expansion.



IMPROVE PHASE

Key Actions, continued

STEP 3. Embed AI into the organizational culture.

- ❑ **Leverage champions.** Engage champions, sponsors, and leaders to evangelize success stories and encourage teams to think of agents when solving problems, not as an afterthought.
- ❑ **Integrate agentic solutions into KPIs or OKRs.** Consider integrating agentic usage or solutioning into performance metrics or business reviews (e.g., discuss how processes are being improved by AI in quarterly ops meetings).
- ❑ **Evolve the organization's maturity to become an AI-first culture.** Create a roadmap to move through the patterns of becoming a [Frontier Firm](#), with deeper integration of AI into everyday work and business processes and new ways of human-agent collaboration.

RESOURCES

- [Patterns of becoming a Frontier Firm](#)
- [Microsoft Work Trend Index Annual Report – 2025: The year the Frontier Firm is born](#)



IMPROVE PHASE

Measuring success

By the end of the Improve phase, you should have...

- ...transitioned the agentic solution to “business as usual”
- ...captured insights to improve and expand agentic usage within the organization
- ...further embedded AI into the organizational culture

EXAMPLE OUTPUTS

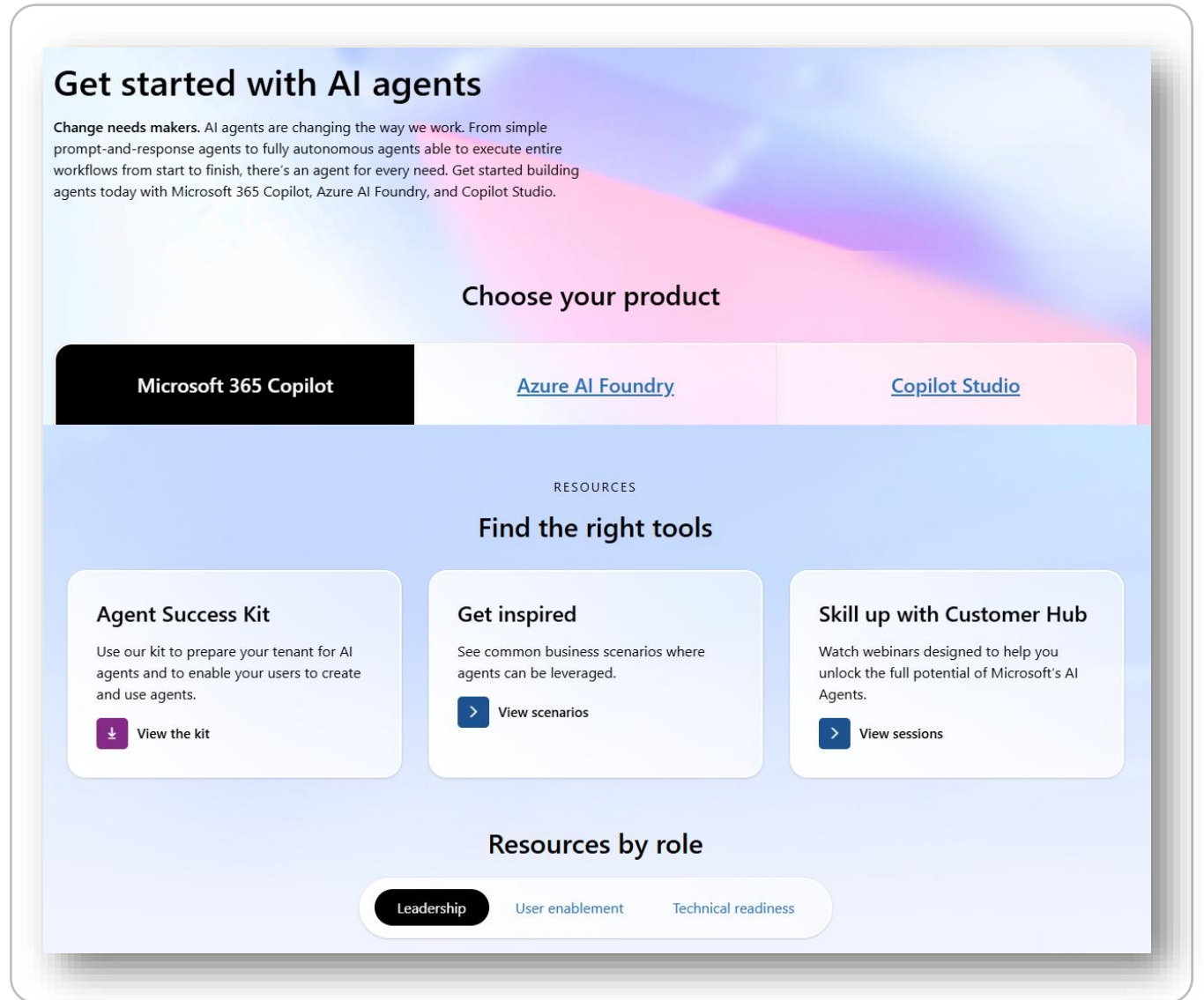
- ✓ Post-implementation review
- ✓ Agent lifecycle management plan
- ✓ Trend analysis of success measures
- ✓ Plan for next steps in agentic usage and AI transformation



Resources

AI Agents Hub

[Microsoft's AI Agents Hub](#)

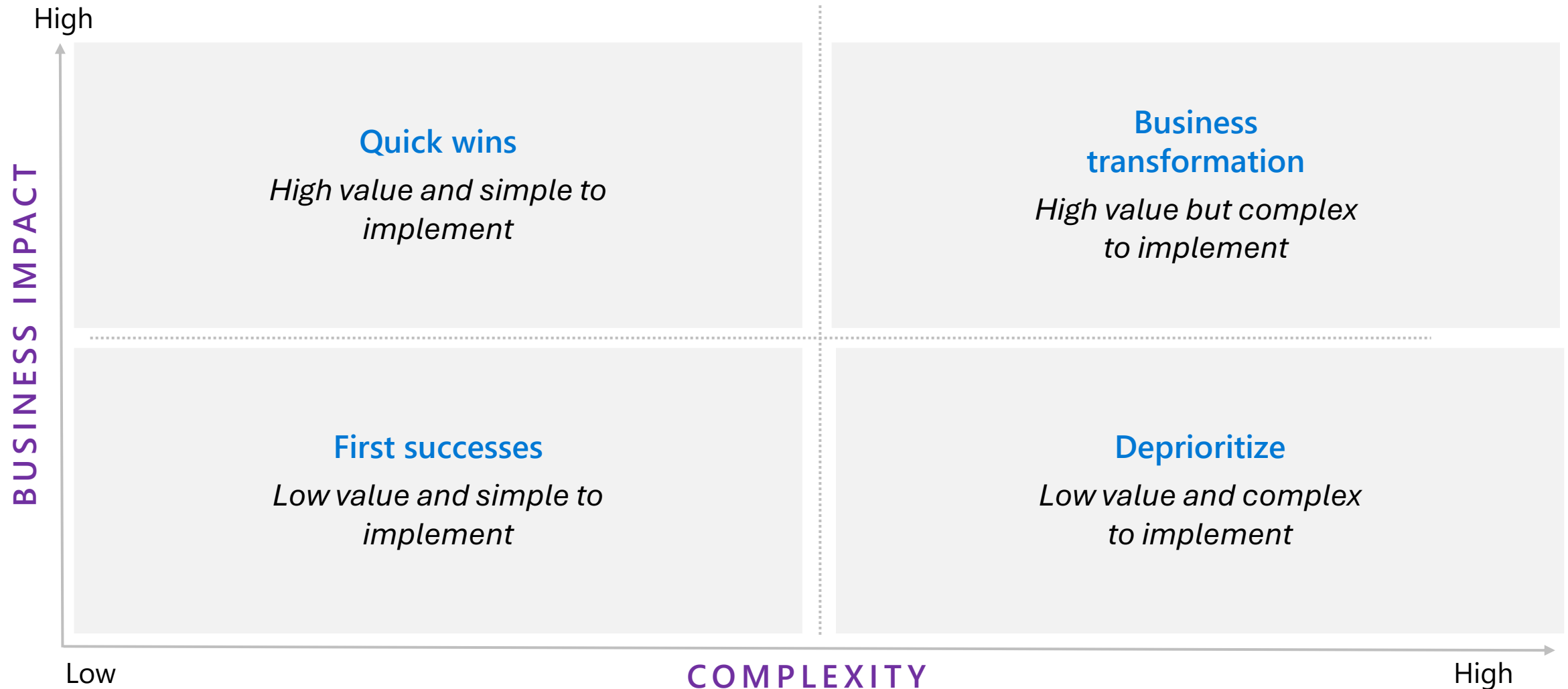




Appendix

Scenario prioritization matrix

To be used organization-wide or within groups



Agentic solution envisioning template (1 of 2)

Scenario name	Type here...		
Success metrics / KPIs <i>What metrics or KPIs will be used to measure the effectiveness or impact of the solution?</i>	Bullet 1	End users / personas <i>Who will directly use the solution?</i>	Bullet 1
Problem statement <i>Give the high-level overview of what the scenario will address once created in M365 Copilot.</i>	Type here....	Solution <i>Details the solution and how the agent is expected to work in the context of the given business process/scenario with the persona.</i>	Type here....
Target outcome/ Expected impact <i>Indicates how the agent is expected to transform the work being performed and address the pain points faced by the employees.</i>	Type here....		

Agentic solution envisioning template (2 of 2)

Scenario name	Type here...	
Current state <i>Provide a high-level description of the current state process flow.</i>	Future state <i>Provide a high-level description of a future state process flow. Specify where an agent would be included in the process flow to address the challenge or drive efficiency.</i>	
Type here....	Type here....	



Steps to build a business case and measure value of AI use cases

Build a business case

Identify KPIs and business outcomes

Identify where the AI solution can drive value

Define operational KPIs and business outcomes

Forecast the ROI

Know what you want to improve

Estimate potential impact and expected benefits

Compare costs and benefits to make ROI projection

Measure ROI

Measure realized ROI

Launch and track adoption

Monitor defined KPIs, compare against baseline or control group

Gather feedback to refine solution

Calculate the realized ROI

Insights and Iteration

Summarize and communicate the outcomes and learnings

Refine the solution and adoption approach based on learnings

Identify where the AI use case can drive value

	Revenue impact	Employee or customer experience	Quality improvement	Cost savings	Productivity & efficiency	Security & risk management
	<i>Drive more business</i>	<i>Improve satisfaction and engagement</i>	<i>Enhance deliverable accuracy</i>	<i>Reduce operating costs</i>	<i>Help teams do more, faster</i>	<i>Spot and reduce risks earlier</i>
Example	Sales reps use Sales Copilot to increase the BDM contacts	Copilot agent analyzes customer sentiment and flags risks	Product engineering uses Researcher Agent for QA	Employee Self-Service agent automates IT and HR inquiries	HR Analyst uses Copilot agent to screen candidates	Security Copilot agent flags risks in real-time
KPIs	Opportunities created	Customer risk score	Defect recurrence rate	Resolution time	Time to review	Threats detected
Outcomes	Revenue per seller	Retention	CSAT	Lower support costs	Time to hire	Reduced fines

Operational KPI: Metric that reflects the performance of a specific process or function within an organization (e.g., sales cycle time)

Business outcome: Broader strategic result that reflects overall impact of initiatives on the organization's goals (e.g., increased sales)

AI value metrics continuum

Adoption metrics

Usage, engagement, and retention of AI products, use cases, and agents

Foundational value metrics

Examples:

Copilot adoption and usage frequency
Use case or app usage
Agent adoption, repeat usage

Operational KPIs

Performance of a specific process or function within an organization

KPI impacted most directly by the AI use case or agent

Examples:

Sales opportunities created
Support case resolution time
Customer risk score
Time for application review

Business outcomes

Strategic results that reflect the overall impact of AI tools and solutions

Broader strategic result that reflects overall impact of AI on organizational goals

Examples:

Revenue per seller
Support cost savings
Customer retention
Time to hire

Leading indicators

Lagging indicators

Addressing resistance to agent adoption

Common reasons	Explanation of resistance	How to mitigate
Job security	Employees worry that agents will automate tasks to the point of making their roles redundant, leading to anxiety about job loss or devaluation.	Host open discussions and roundtables to clarify that agents are designed to augment—not replace—human roles. Share real examples of how agents free up time for higher-value work.
Data security and confidentiality	Employees are concerned about the security of their data, particularly how the data is accessed, stored, or shared.	Clearly communicate how security and governance are handled. Link to existing policies related to responsible AI and data security; explain how these measures protect user data.
Lack of early involvement	Key stakeholders, like impacted employees and change managers, are often brought in <i>after</i> the agent is built, which can lead to poor adoption.	Emphasize that change management efforts should begin before agent development. Engage stakeholders early on to build buy-in and collaboratively shape the solution.
Unclear purpose or value	Employees do not understand what the agent does or how it could benefit them in their day-to-day work.	Reinforce the reasons and intended benefits for the agentic solution in ongoing communications. Leverage leaders to champion the agent's value.
Trust in agent outputs / performance	Concerns about the accuracy and reliability of agent-generated outputs (e.g., errors, misleading information, actions) can undermine trust.	Train users to spot and correct AI errors, provide checklists for verifying outputs, and reinforce the importance of human oversight.
Change fatigue	Employees feel overwhelmed by the pace of digital transformation and frequent introduction of new tools.	Pace the rollout, prioritize change management, and provide ongoing support to avoid burnout.

Gathering employee feedback in the Plan phase

Focus groups and surveys are common methods to gather employee feedback. These questions will help you assess employee sentiment about the agentic solution prior to implementation so that you can proactively address any concerns or obstacles to adoption.

EXAMPLES

FOCUS GROUP QUESTIONS

1. How do you think the Copilot agent will benefit you or your team?
2. What concerns do you have about the Copilot agent?
3. What would help you build trust in the Copilot agent?
4. What support would be helpful for you in using the new process / agent?
5. What could be done to make the transition to using the new process / agent easier for you or your team?

SURVEY ITEMS ¹

1. I feel good about using a Copilot agent for the XYZ process.
2. The reasons for using a Copilot agent in the XYZ process are clear to me.
3. I am well-informed about this change.
4. I understand how this change will affect me.
5. I know where to find answers to my questions about this change.
6. I am getting the support I need for this change.
7. My manager has open and honest discussions about this change with my team.
8. What is the biggest benefit of this change to you?
9. What is the biggest concern that you have related to this change?

¹ Items 1-7 are intended to be rated on a 5-point Strongly Disagree to Strongly Agree scale. Items 8-9 are open-ended items.

Use Copilot Studio Agents Report to identify actionable insights

		Agent satisfaction score	
		Low	High
Agent resolution rate	Low	This agent is not delivering value. • Review the agent's configuration to confirm it has been set up correctly. • Prioritize for redesign or retirement. • Interview users or review logs to understand failure points. • Consider whether the agent's purpose is still relevant.	Users like the experience but aren't getting what they need. • Investigate if the agent is too limited in scope or lacks access to needed data. • Expand capabilities or improve escalation paths. • Consider retraining the model or refining intents.
	High	Tasks are being completed, but the experience may be frustrating or confusing. • Review the agent's configuration to confirm it has been set up correctly. • Review conversation logs for friction points (e.g., tone, length, complexity). • Improve user experience elements like clarity, empathy, or speed. • Consider user feedback mechanisms to pinpoint dissatisfaction.	This agent is performing well and meeting user needs. • Use it as a benchmark—analyze what makes it successful (e.g., tone, flow, content). • Consider scaling or promoting it more broadly. • Replicate its design patterns in underperforming agents.

Use agent trend data to identify opportunities to improve

Trend	Potential Interpretation	Recommendation
Rising session volume	Increased adoption or successful rollout	• Investigate which agents or topics are driving growth. • Reinforce successful patterns and replicate them across other agents. • Review satisfaction scores to ensure quality is keeping pace with volume.
Declining session volume	Possible user disengagement, technical issues, or seasonal drop-off	• Check for recent changes in agent behavior, broken triggers, or user feedback. • Re-engage users with targeted communications or improvements. • Review satisfaction scores to identify if declining quality is contributing to the drop.
Flat or stagnant volume	Stable usage, but possibly underutilized potential	• Consider promotional efforts, training, or expanding the agent's capabilities to drive more value. • Analyze satisfaction scores to determine if users are content or indifferent.
Low volume	Very few sessions may indicate low adoption or discoverability.	• Promote the agent in internal communications (e.g., newsletters, Teams). • Educate and train users. • Review satisfaction scores from the limited sessions. Positive scores suggest the agent is on track and you may need to increase awareness. Negative scores indicate improving the agent before wider deployment.
Sudden spikes or dips in volume	Could indicate a campaign, outage, or a new feature rollout	• Coordinate with internal events or releases. • Use these insights to plan future launches or mitigate issues. • Check satisfaction scores to assess user sentiment during the spike or dip.

Every company is on a journey to becoming a Frontier Firm

Pattern 1

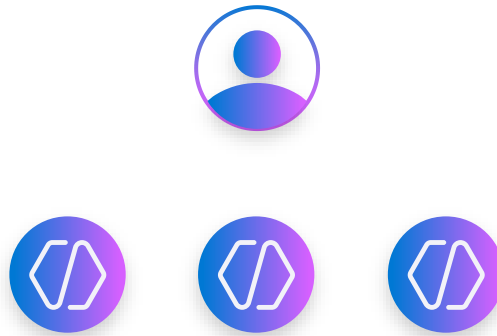
Human with assistant



Every employee has an AI assistant that helps them work better and faster

Pattern 2

Human-led agents



Agents join teams as “digital colleagues,” taking on specific tasks at human direction

Pattern 3

Human-led, agent-operated



Humans set direction and agents run entire business processes and workflows, checking in as needed