



Upleveling your work with Microsoft 365 Copilot agents

Microsoft 365 Copilot licensed users



What's inside

Microsoft 365 Copilot includes pre-built agents that help you work smarter, from creating content and analyzing data to running meetings.

Included with Microsoft 365 Copilot

Here's what we'll cover

- 1 Word, Excel, and PowerPoint Agents**
Create polished documents, spreadsheets, and presentations from chat
- 2 Researcher**
Collect and synthesize information for deeper, more informed decisions
- 3 Analyst**
Turn raw data into actionable insights with advanced reasoning
- 4 Facilitator**
Run more effective meetings with real-time notes, agendas, and action items
- 5 Coaches**
Leverage coaches for better prompting, brainstorming, and everyday tasks



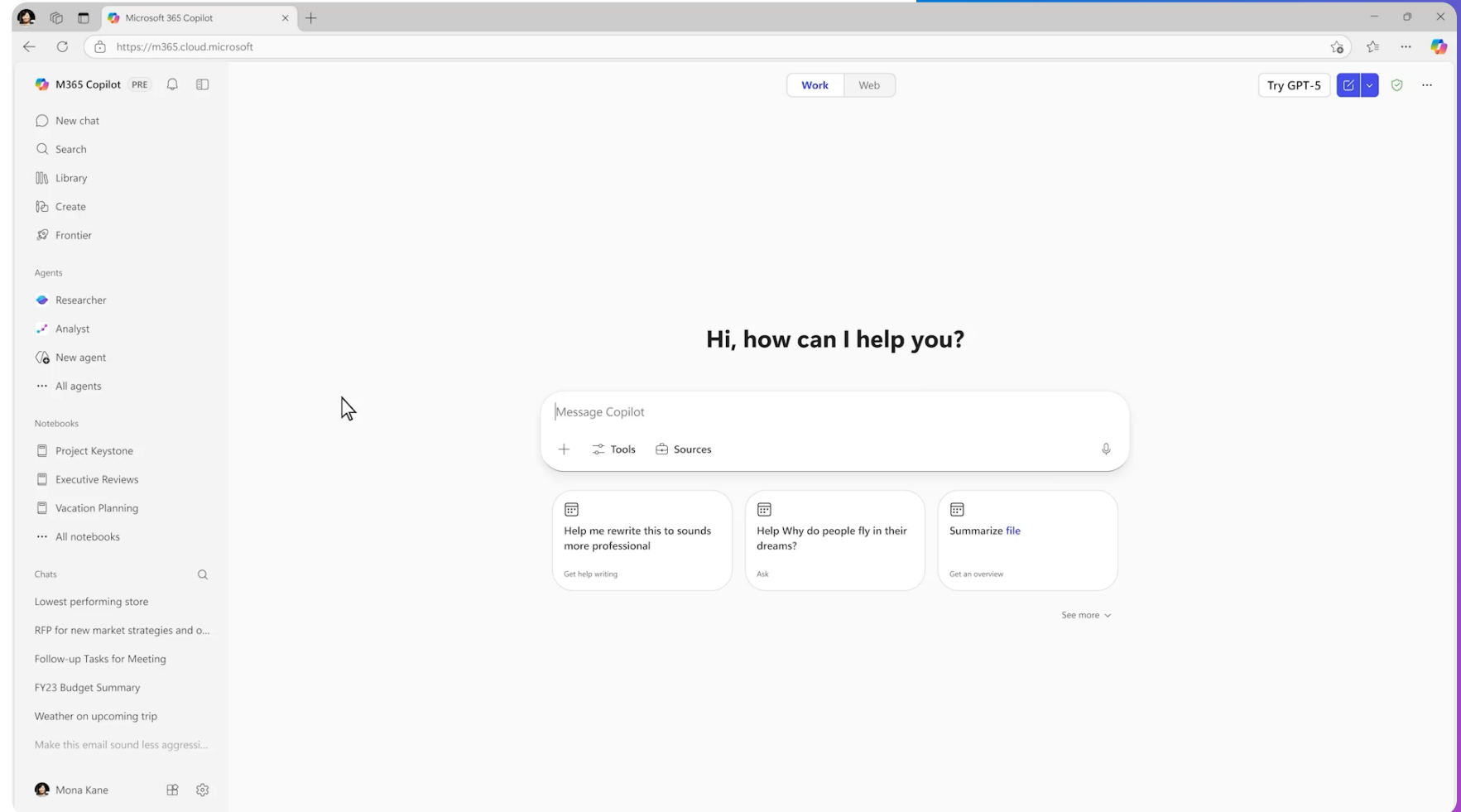
Word, Excel, and PowerPoint

Included with Microsoft 365 Copilot



Word, Excel, and PowerPoint Agents

- ✓ Turns ideas into polished documents, spreadsheets, and presentations directly in chat.
- ✓ Reasons over content with both Work IQ and web sources to research, analyze and create high-quality outputs.
- ✓ Works to clarify your request through targeted questions about focus, structure and files.
- ✓ Refine results in Chat or open in the Word, Excel, or PowerPoint apps to edit and collaborate further.



Why choose Word, Excel & Power Point Agents for content creation

Copilot creates AI content the same way teams already work — collaboratively, securely, and in one shared version.

1

Grounded in your work

Uses Work IQ, so edits reflect what's current and relevant across your files, meetings, emails, chats and relationships.

2

Native app fidelity & integration

Creates real Excel formulas, Pivot Tables, and charts; uses company templates in PowerPoint; and applies approved Word templates, so outputs work as intended.

3

Built for collaboration

Supports team collaboration in shared files stored in OneDrive and SharePoint, so teams iterate on a single, shared version.

4

Trusted

Enforces M365 permissions and labels, saves to OneDrive/SharePoint and applies tenant control, preventing unauthorized processing and enabling governance at scale.

5

Full visibility & control

Applies changes directly in Word, Excel, PowerPoint and Outlook, so edits are transparent, reviewable, and reversible as you iterate.

6

Model choice

Brings leading models from multiple providers into your work experience, so you can get high-quality output for the task without switching tools.

How the agents work

How to use Word, Excel & PowerPoint Agents

- Find the file(s) that you want Copilot to analyze and pull information from. Add the files to your prompt to the agent, either by uploading directly or selecting from your Microsoft 365 files.
- The agents support up to 5 files at once across multiple formats (Word, PPT, PDF) and datasets (Excel, CSV).
- Provide the agents context of the problem and what you're trying to achieve by creating a new document. Mention if you want the information in a specific format like a table or graph.
- Word, Excel & PowerPoint agents will then understand the data, construct a plan, and ask a few questions to refine before producing the draft document.

TIP The process *may take a few minutes* - you can follow the chain-of-thought reasoning or continue with other priorities while it works.

Where to find the agents

- For users with a Microsoft 365 Copilot license
 - Word, Excel and PowerPoint agents are accessible as an agent in Copilot Chat in the Microsoft 365 Copilot app – select the + button in Copilot Chat.
 - Access them via the Agents menu in the Microsoft 365 Copilot app or type @Word, @Excel, or @PowerPoint in Copilot Chat

What makes these agents special

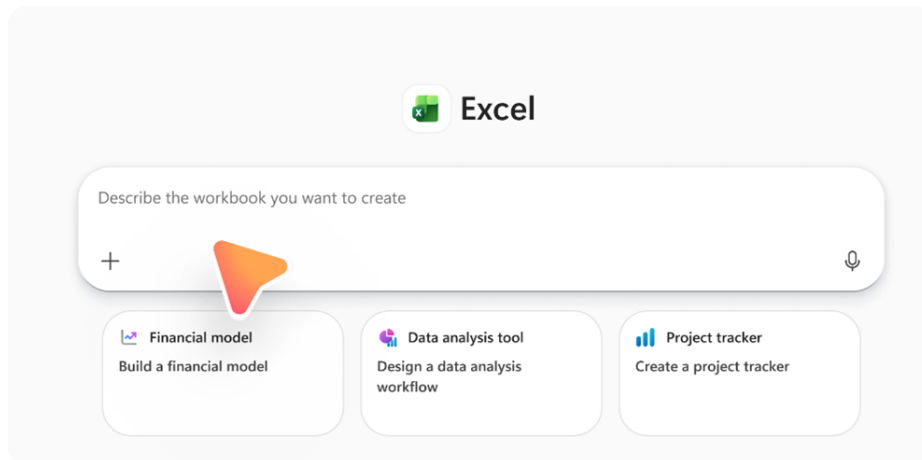
- Word, Excel and PowerPoint agents leverage WorkIQ providing them context about your work and your organization's information such as your shared documents, emails, conversations, making the results relevant to your business needs.
- These agents will store created files in OneDrive, and follow your organization's security, privacy and compliance policies.

Copilot can help create and then refine content in app

1

Create a file

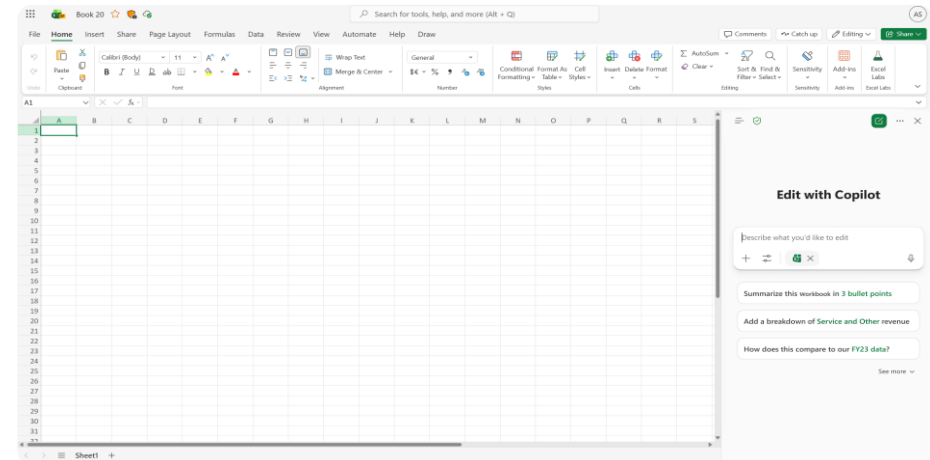
- In the Microsoft 365 Copilot app on the web or in Teams, go to the Agents menu, and choose the Word, Excel, or PowerPoint Agent. Enter your prompt describing the file you want to create.
- The Word, Excel, and PowerPoint Agents can also be accessed via the Agent Store.



2

Continue editing in app

- After creating a first draft with the agent, you can open it and edit immediately in Word, Excel, or PowerPoint. Open Copilot chat in the app and select the Tools icon below the area where you would input your prompt, then select 'Edit with Copilot'.



Cheat sheet: When to use Copilot for Word, Excel, and PowerPoint creation

App	What you can do	Example prompts to create a file	Example prompts to continue editing in app
Excel	Build and iterate on spreadsheets • Create structured workbooks • Analyze and model scenarios • Visualize data with charts and summaries	Create from scratch (in chat or in Excel): "Create a project tracking workbook with tasks, owners, due dates, and status, plus a summary sheet."	Multi-step actions (in Excel): "Add formulas to calculate on-time completion rate and highlight overdue items." Model scenarios and sensitivity (in Excel): "Add best-, base-, and worst-case scenarios for this forecast and explain the assumptions along with a sensitivity analysis." Visualize data (in Excel): "Create a PivotTable and charts showing status by owner and overall risk in a dashboard format to share with my team."
Word	Create, refine, and maintain real documents • Draft net-new content • Improve tone, clarity, and structure • Update recurring documents with new info	Create (in chat or in Word): "Create a 2-page customer brief explaining our Q3 product strategy, including goals, key initiatives, and success metrics."	Refine (in Word): "Rewrite the executive summary to be more concise and executive-ready, and add clear section headers." Targeted edits (in Word): "Turn this section into a table comparing options and bold the recommended choice." Update an existing doc (in Word): "Update this monthly report with the latest September results and adjust the conclusion to reflect the new data."
PowerPoint	Create, transform, and polish presentations • Generate a first-draft deck fast • Transform text into visuals • Edit while preserving layout and brand	Create (in chat or in PowerPoint): "Create a 6-slide executive update on our go-to-market plan, including progress, risks, and next steps."	Polish (in PowerPoint): "Tighten slide titles, simplify the content, and keep the existing layout." Transform (in PowerPoint): "Turn the bullet list on this slide into a chart." On-brand edits (in PowerPoint): "Add a new slide using my company template." + "Make sure this deck follows brand guidelines."

Word Agent in Action

Included with Microsoft 365 Copilot

Word Agent creates and refines long-form documents from a prompt — handling structure, research, and formatting so you can focus on ideas.

Examples



Proposal creation

Prompt

Create a proposal for [customer/product] using [file] as a template.

- Pull context from emails, Teams chats, meeting transcripts, and recent customer files (last 90 days)
- Include: customer situation, recommended solution (and options), assumptions, milestones, risks, ROI/pricing placeholder
- Add the following sections: cover page, executive summary, table of contents, and next steps



Event update

Summarize [Company name] 2025 announcements and themes

- Use Announcement-related emails, files in [folder], Teams chats, meetings, and internal strategy/roadmap docs (last 60–120 days)
- Map announcements to our priorities
- Include: top themes, project implications, opportunities/risks, next actions
- Also draft a 5–7 minute podcast script



Build a report

Write a report on [industry] trends:

- Use internal project docs, design notes, OKRs, emails, chats, and meeting notes (last 12–18 months)
- Consider web sources: [research sites], [regulation sites], [industry reports]
- Focus on [customer segments]
- Include: internal vs external themes, roles/skills table, 12–24 month outlook, prioritized recommendations



Evaluate options

Create a document to compare [option 1] and [option 2] to develop [project name]:

- Use project requirements, strategy doc, documents describing [option 1] and [option 2], and experiment notes in [project folder] and documents
- Use emails and chats and meetings related to [project name] and from [team names]
- Include: introduction, background, description of the options, pros and cons, recommendations, and next steps



Executive Summary

Create an executive summary of the main discussion points over [project name]

- Consider my Teams chats in [channels] and Outlook threads about [project name] for the last 4 weeks
- Include: background, discussion points, proposed actions, risk and mitigation, and recommended next steps
- Limit the document to 3 pages

Excel Agent in Action

Included with Microsoft 365 Copilot

Excel Agent builds and analyzes spreadsheets using natural language — generating formulas, summaries, and performing multi-step data tasks with iterative reasoning.

Examples



Sales planning

Prompt

- Create a workbook called 'Q2 Sales Plan':
- Include sheets for Pipeline, Actuals, and Assumptions
 - Fill last 6 months with data from [Dataset.xlsx] for [customer segments] across [regions]
 - Use clean tables and proper dates



Financial model

- Create discounted cash flow (DCF) model for [project name]:
- Consider project financials in [data file] and model assumptions in [data file]
 - Include: assumptions tab, revenue build, full income statement and free cash flow bridge, DCF valuation and terminal value, sensitivity table across WACC and terminal growth ranges
 - Formatting: use standard financial formatting



Project tracking

- Create a project tracking system for [project name]:
- Include tasks, owners, milestones, budgets, and risk ratings
 - Use recent workback plans in [folder], sprint notes, and budget files [data files]
 - Generate: Gantt-style timeline, conditional formatting for at-risk/overdue tasks
 - Include: dashboard with burndown charts, budget tracking, risk heatmap, and status-ready summary



Scenario modeling

- Build a multi-year growth model for [product name]:
- Consider historical revenue, cost, pipeline, renewal, and pricing guidance data [data file]
 - Include: full P&L, cash flow, balance sheet views
 - Use: driver-based forecasting, base/upside/downside scenarios
 - Add: sensitivity analysis (price, win rate, churn), error checks, dashboard, and executive summary



Market forecast

- Build a market forecast for [category] in [region] for [range of years]
- Use latest data on [category] sales and growth rates from [file], and adjustable assumptions in [file]
 - Include: assumptions, revenue forecast by segment, summary

PowerPoint Agent in Action

Included with Microsoft 365 Copilot

PowerPoint Agent turns prompts into complete presentations — generating slides, layouts, visuals, and helping refine content.

Examples



Project update

Prompt

Create a leadership-ready project update deck on [topic]

- Pull: decisions, milestones, owners, dates from emails, Teams chats, meeting notes
- Add: external benchmarks and competitor/news context
- Include: status vs goals, top risks with mitigations, open asks, timeline, action-item table



Financial analysis

Build a presentation to discuss [range of years] forecast for [business unit] in [region]

- Use: internal assumptions, prior models, stakeholder notes from emails, chats, meeting recaps
- Include infographic for TAM and growth drivers with industry reports and public filings from [file]
- Include: assumptions, business unit forecast charts and tables, breakdowns by key segments, and sensitivity analysis



Retirement savings plan

Create an employee-facing slide deck to increase retirement plan participation

- Pull: program details (match %, eligibility, enrollment steps, deadlines) from HR emails, benefits PDFs, Teams posts
- Include: FAQs, narrative with examples, 'How to enroll' guide, key reminders, manager talk-track



Business planning

Draft an 8-slide plan the launch of [event name] in [location] with budget [amount]:

- Use: internal templates [template file], past event runbooks, vendor notes in [folder]
- Consider: permit/health requirements from city/county guidance
- Include: working backward timeline, staffing, budget breakdown, compliance checklist with owners



Campaign readout

Create a deck summarizing our demand gen campaign performance for [quarter]:

- Consider structure from past campaign readout in [file] and data from [data file]
- Consider all major channels (paid search, paid social, onsite, and events)
- Include: key performance indicators, spend/ROI, top performing channels and assets, learnings, and recommendations
- Limit to 10 slides intended for marketing leadership

Top Industry Use Cases

Included with Microsoft 365 Copilot

Researcher gives organizations the capability they'd expect from a highly paid strategist or researcher, by combining the most advanced deep reasoning models with your organization's work data and information on the web.



Healthcare

Doctors and researchers face information overload with vast amounts of medical data

Try this prompt in PowerPoint Agent: "Build a 10-slide presentation summarizing the latest research on [medical topic] for a hospital leadership briefing, including key findings and implications."



Retail

Retail managers struggle with inconsistent data from various sales channels

Try this prompt in Excel Agent: "Build a dashboard comparing online vs in-store sales by region and product category, with trendlines and inventory turnover rates."



Legal

Lawyers and legal researchers need to sift through vast amounts of case law and legal documents.

Try this prompt in Word Agent: "Draft a legal brief summarizing recent case law on [topic], referencing internal memos, past case files, and regulatory updates."



Finance

Financial analysts need to stay updated with market trends and regulatory changes

Try this prompt in Excel Agent: "Build a financial model for a new product launch, including revenue projections, cost breakdowns, and ROI scenarios."



Manufacturing

Engineers and production managers need to monitor and analyze production data

Try this prompt in PowerPoint Agent: "Build a presentation for the operations team showing bottlenecks, downtime trends, and proposed process improvements."



Technology

Need to stay ahead of rapidly evolving technology trends and security threats

Try this prompt in Word Agent: "Write a whitepaper on emerging AI security risks, using internal threat reports, industry publications, and recent incident data."

Experience the Benefits today

Microsoft 365 Copilot licensed employees now have access to the Word, Excel and PowerPoint Agents within the Agent menu in the Microsoft 365 Copilot app.

Try it today on [Microsoft 365 Copilot](#).

Also available via the M365 Copilot Mobile App



Describe the document you want to create

+ Sources



 Project status update

Write a clear status update for
[project](#)

 Strategic planning document

Create a strategic planning
document about [project](#)

 Technical documentation

Draft a technical documentation
paper about [topic](#)

Learn more

- See the Excel, Word and PowerPoint agents in action in our [announcement blog](#)
- [Get started with Word, Excel, and PowerPoint Agents in Microsoft 365 Copilot](#)



Researcher

Included with Microsoft 365 Copilot





Researcher

Researcher gives organizations the capability they'd expect from a highly paid strategist or researcher, by combining the most advanced deep reasoning models with your organization's work data and information on the web.

Delegate complexity. Gain clarity. Stay ahead.

Thorough

Researcher goes beyond quick answers - it comprehensively compiles data, trends and insights for proposals or decisions

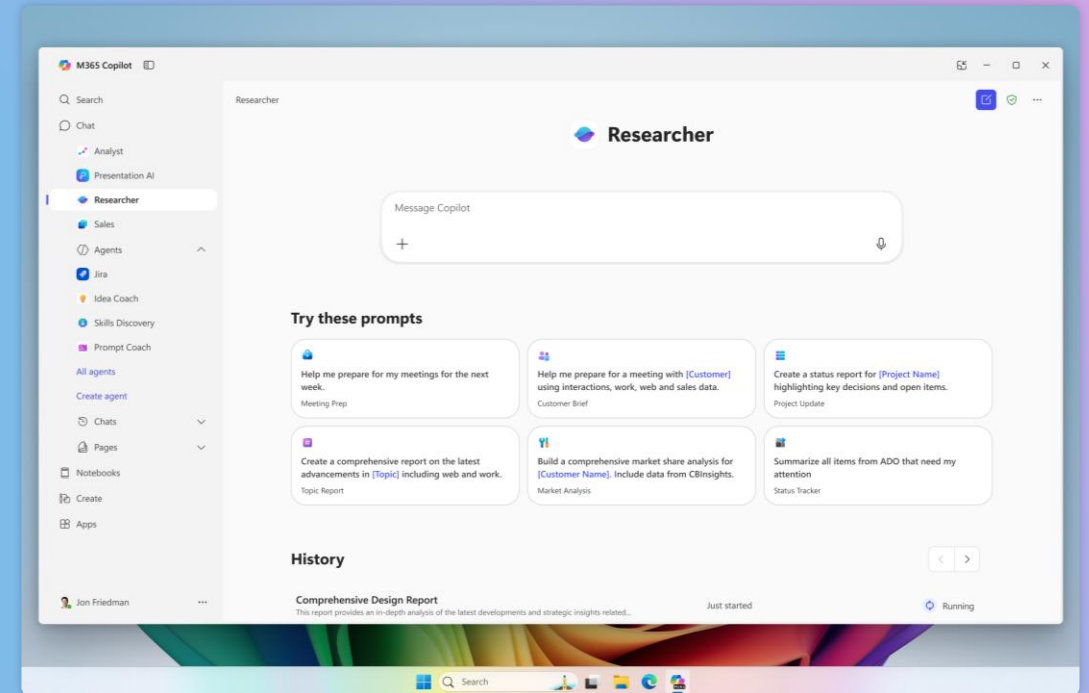
Purposeful

Researcher considers the outcome and works **FOR** you - autonomously synthesizing multi-step, multi-source analysis

Trusted

Enterprise security for your M365 data combined with external insights transparently **source-cited** for increased confidence

Included with Microsoft 365 Copilot



*It searched **everywhere**—my meeting transcripts, shared files, the web—[it] makes me trust the final recommendation much more. I have found myself using Researcher daily.* Product Manager

How it Works

Knowledge workers rely on **two types of data:**

Web Data

Publicly available data that helps define the current state of the world.

Work Data

The proprietary data that a user has access to, from emails and call transcripts to SharePoint sites and databases.

Copilot Chat relies on the latest large language models to quickly search work and web data sets and provide rapid quick, concise answers.

Retrieval Augmented Generation

Copilot Chat uses a tool called Retrieval Augmented Generation to search across all of a user's data – and the web – to extract the items most relevant to the question asked.

Researcher builds on Copilot Chat with a new class of models – advanced reasoning models – to create a research plan, execute it, and build more comprehensive, complex, and exec-ready reports.

Chain of Thought

In response to a prompt, Researcher uses recursive reasoning to understand a task, perform research, and create a report.

Research

Researcher is built on a model that's been taught to think like a professional researcher.

Tip !

Researcher works FOR you to compile deeper, more thorough content – this may take minutes. Continue tasks, attend a meeting or use M365 Copilot via another channel while it works!

How it Compares



Enhances the reasoning engine, but interaction remains conversational

Included in all Microsoft 365 Enterprise SKUs via Chat GPT 5.2 LLM

Output: Conversational, user-driven interactions

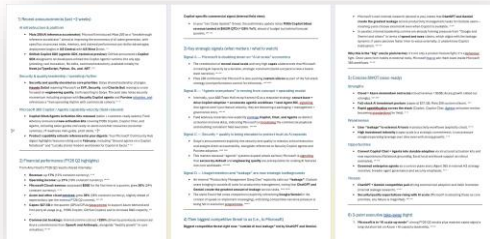
Use it when:

- You're iterating, brainstorming, or drafting
- You know what to ask and how deep to go
- Speed matters more than completeness

Sources: Optional/light weight

No agent orchestration

Example: Deep Thinking Output, 3 prompts (~1 minute), exported to edit



Purpose-built to reason within your enterprise & produce trusted, decision-ready outputs

Included with M365 Copilot licensed SKU as pre-built agent

Output: Thorough, synthesized report compiled over several minutes

Use it when:

- You want inputs with an ambiguous or cross-domain construct
- You want Copilot to *do the research*, not help you do it
- The output must be trusted, cited, and shareable
- E.g. for a plan, proposal, client summary, executive report, business case

Sources: Built-in, explicit source citing

Can call other agents

Example: Researcher Output, single prompt (~3 minutes), editable



Researcher in Action – no PhD required!

Researcher gives you the capability you'd expect from a highly paid strategist or researcher, saving you time and producing quality outputs, by combining the most advanced deep reasoning models with your organization's work data and information on the web.

Examples



Competitive Analysis

Client Prep

Industry Research

Project Status Updates

Personal Productivity

Pain point	Hard to track competitors quickly and consolidate insights across sources.	Preparing for client meetings requires gathering scattered context under tight deadlines.	Teams drown in information when trying to understand industry trends.	Project updates live in many places, making status and blockers unclear.	Busy schedules make it hard to prioritize tasks and plan effectively.
Researcher can help	Get fast, competitive insights with internal and external data.	Summarize client history and insights into a meeting brief.	Get relevant trends into focused, actionable insights.	Consolidate updates, highlight decisions, and surface risks.	Analyze your workload and create a clear, prioritized weekly plan.
Prompt	<i>Brief me on the latest developments at [Company Name]. Include:</i> - Recent announcements - Financial performance - Key strategic signals <i>Then outline their biggest competitive threat to us and a concise SWOT analysis</i> <i>Summarize with a 3-point executive-level take-away</i>	<i>Prepare a briefing for my meeting with [Client Name]. Include:</i> - Recent news and business priorities - Past interactions with us - Roles of stakeholders attending <i>Outline potential objections and how to address them with tailored recommendations for how we can add value</i>	<i>Produce a synthesized report on the current state of [Industry]. Include:</i> - Key trends and regulatory shifts - Emerging players and technology disruptions <i>Then explain how these developments may impact our business, product, or strategy with 3–5 strategic considerations we should monitor or act on</i>	<i>Aggregate all updates for Project [Name] across documents, chats, meetings, and emails. Provide:</i> - A detailed timeline of actions, decisions, open issues, and risks - Flags for blockers and likely owners - Recommended next steps <i>Then summarize what leadership should know for a status review</i>	<i>Using my calendar, emails, chats, and current documents, create a prioritized weekly plan. Identify:</i> - My top objectives, deadlines, and required follow-ups - Meetings to keep or decline - Prep work needed <i>Then suggest:</i> - Focus blocks aligned with current company context

Top Industry Use Cases

Researcher gives organizations the capability they'd expect from a highly paid strategist or researcher, by combining the most advanced deep reasoning models with your organization's work data and information on the web.



Healthcare

Doctors and researchers face information overload with vast amounts of medical data

The Researcher Agent synthesizes data from medical journals, patient records, and clinical trials to provide comprehensive reports, aiding in faster and more accurate diagnoses.



Retail

Retail managers struggle with inconsistent data from various sales channels

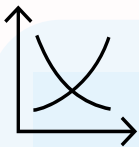
The Researcher Agent consolidates data from online and offline sales, customer feedback, and market trends, helping managers optimize inventory and improve customer satisfaction.



Legal

Lawyers and legal researchers need to sift through vast amounts of case law and legal documents.

The Researcher Agent analyzes legal texts, case law, and regulatory information, delivering comprehensive reports that support legal arguments and case preparation.



Finance

Financial analysts need to stay updated with market trends and regulatory changes

The Researcher Agent aggregates data from financial reports, market analysis, and regulatory updates, delivering detailed insights for informed investment decisions.

Manufacturing

Engineers and production managers need to monitor and analyze production data

The Researcher Agent compiles data from production logs, quality control reports, and supply chain information, providing insights to improve efficiency and reduce downtime.



Technology

Need to stay ahead of rapidly evolving technology trends and security threats

The Researcher Agent gathers data from tech blogs, security reports, and industry publications, providing detailed insights to help IT professionals make informed decisions and stay ahead of threats.

Analyst

Included with Microsoft 365 Copilot





Analyst

is a reasoning agent that uses iterative chain-of-thought reasoning for advanced data analysis – turning raw data to insights in minutes with the power of OpenAI models optimized by Microsoft for data analysis.

From data to insight. Make decisions with confidence.

Decisive

Surfaces insights that matter with clear next steps - turning complexity into confident, timely decisions.

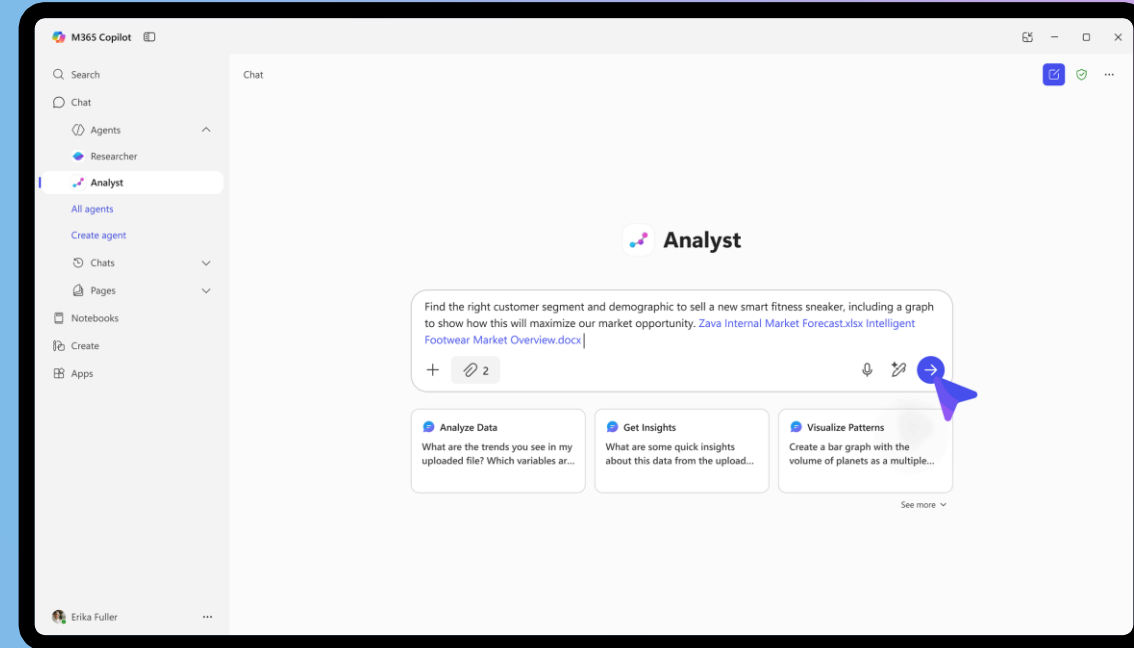
Intuitive

Makes insights easy to grasp, guiding anyone to clear understanding with no need for data science expertise

Reliable

Grounded in your secure M365 data, Analyst produces transparent, source-linked summaries and recommendations you can trust

Included with Microsoft 365 Copilot



Analyst helps users “ask their data questions in plain language — and get back not just answers, but actionable analysis.”
Alan Cox, Microsoft MVP

Addresses Data Challenges



Data overload: Organizations are inundated with structured and unstructured data from countless sources—making it difficult to extract timely, actionable insights.



Reliance on specialized skills: Extracting value from complex data often requires technical expertise—SQL, Python, BI tools—creating bottlenecks and reliance on specific roles

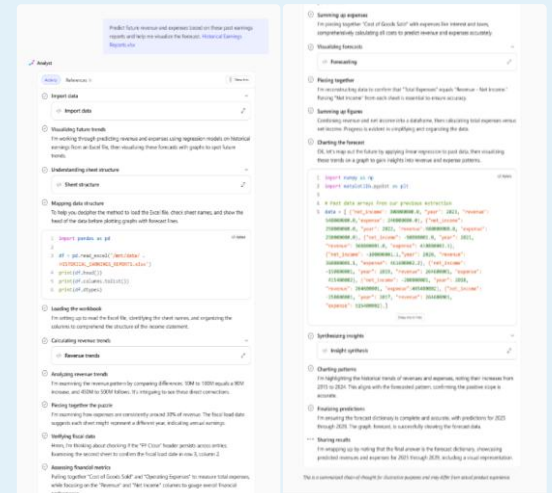


Fragmented tools and silos: Data lives in disconnected systems—Excel files, reporting systems, internal dashboards—making it difficult and time consuming to distill tangible insights

Traditional large language models jump too quickly from problem to proposed solution - often failing to adjust to new complexities or gracefully recover from mistakes.

Analyst:

- Implements reasoning-driven, chain-of-thought (CoT) architecture derived from OpenAI reasoning models.
- Progresses through problems iteratively by hypothesizing, testing, refining, and adapting – adjusting to complexity to mirror human analytical thinking.



How it works

How to use Analyst

- Find the file(s) with the raw data to analyze and add it to your prompt in Analyst, either by uploading directly or selecting from your M365 files.
- Analyst supports up to 5 files at once across multiple formats (Word, PPT, PDF) and datasets (Excel, CSV, JSON).
- Ask Analyst to provide the insights you're looking for, including specifying the type of visualization or graph.
- Analyst will then understand the data, construct a plan, and execute Python code to reason over the prompt.

TIP The process *may take a few minutes* - you can follow the chain-of-thought reasoning or continue with other priorities while it works.

Where can you use Analyst

- Analyst is accessible as an agent in Copilot Chat in the Microsoft 365 Copilot app, Teams, and Outlook.
- You can @mention Analyst from a Copilot chat or choose it from the Agents menu.

Turning on Analyst

- The agent will appear in the Agent Store under 'Built by Microsoft' located within the 'All agents' and 'Get agents' landing page.
- For users with a Microsoft 365 Copilot license, Researcher and Analyst agents will be pre-pinned for all eligible users.

When to use Analyst

When to use Analyst

- **Consulting multiple data sources:** Gathers and integrates data from different file types for comprehensive analysis.
- **Step-by-step problem solving:** Progresses through challenges by hypothesizing, testing, and adapting responses, making it useful for iterative decision-making.
- **Visualizations:** creates key visualizations for data analysis and presentation.

Best practices

- Upload both structured (Excel, CSV, JSON, etc.) and unstructured (PDF, Word, PowerPoint etc.) data files, up to 5 files at once
- Ask complex, multi-variable questions that require advanced data analysis
- Specify the type of insight or visualization needed
- Review chain-of-thought and Python generated insights for accuracy

Analyst in Action

Your personal data analyst that can reason over raw data from multiple sources to provide insights and visualizations in minutes. Analyst works with both structured (.xlsx, .csv) and unstructured (.docx, .pptx, .pdf) data, conducting advanced data analysis by executing Python code.

Examples



Sales Data Analysis



Executive Briefings



Revenue Forecasting



Customer Feedback



Marketing Targeting

Pain point	Fragmented sales data that impacts the ability to analyze performance and trends.	Leaders need concise, data-anchored talking points for reviews.	Forecasting requires consolidating data from many sources, slowing decisions.	Recurring issues and trends are hard to identify quickly when customer feedback is scattered.	Pinpointing the right audience segments and understand their behavior is difficult.
Analyst can help	Analyze sales data from multi-sources to form trends and insights.	Distill the week's insights into clear narrative with visuals.	Build accurate forecasts using historical and current data.	Quickly detect common themes, anomalies, and summarize trends.	Analyze engagement data to pinpoint refined targeting.
Prompt	Analyze these sales datasets to uncover key trends to: - Identify patterns in sales volume and revenue - Highlight correlations between price and sales performance - Provide insights for pricing or marketing strategies - Present findings using clear visualizations and charts	Create a weekly executive brief from [data sources]. Provide: 5 talking points with metric, variance, and source. 2–3 charts (trend/variance/funnel) - Top risks, decisions needed, and next steps (owner, due date) - Begin with summary status; keep under 400 words; bold items needing attention	Using historical revenue by product/region/segment and pipeline data from [data source], build forecasts for the next 12 months. Show: - Seasonality, win-rate assumptions, and deal-slip risk - A forecast table and drivers' waterfall - A sensitivity analysis for two variables (price and conversion) - Provide a slide-ready chart	Analyze customer feedback from support tickets, surveys, and reviews over the past quarter. Please identify: - The top 5 recurring issues - Sentiment trends - Any emerging concerns Then present: - Visual charts summarizing insights - Recommended actions	Analyze engagement across email, web, events, and social to identify high-value audience segments. Build segments by Firmographics and Behavior Then provide: - Propensity-to-convert ranking and estimated revenue 3 segment profiles with key messages, channel mix, and sample offers - A targeting matrix and a next-best-action list



Facilitator

Included with Microsoft 365 Copilot





Facilitator

Facilitator transforms meetings from conversations into coordinated action. It works alongside your team in real time to structure discussion, capture decisions, and turn ideas into next steps. So every meeting drives clarity, alignment, and measurable progress.

Run more effective meetings. Move work forward, together.

Real-Time

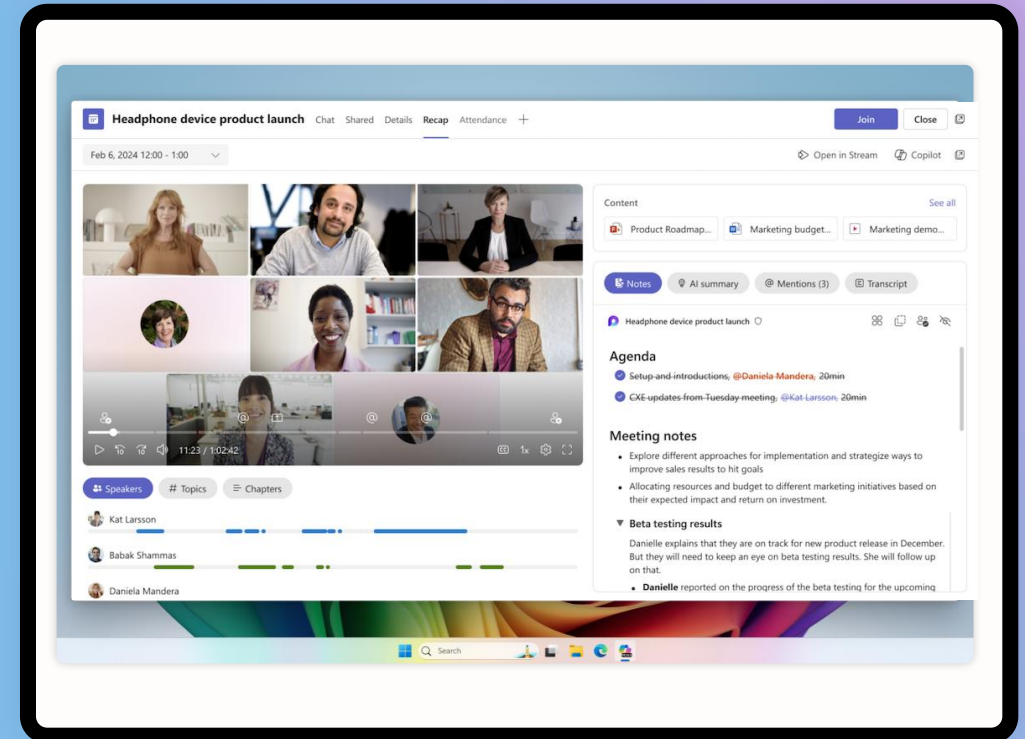
Works during the meeting, guiding discussion, answering questions, and capturing decisions live

In Work-Flow

Tasks, notes, and documents are created and organized as you speak

Collaborative AI

A shared experience that keeps everyone informed, engaged, and moving together



How it works with Copilot

Facilitator joins your meetings and understands the conversation as it unfolds. It builds and tracks agendas, captures real time notes, answers questions, and turns discussions into tasks and documents that everyone can see. You can interact with it naturally through chat, making it feel like a seamless extension of your team.

Copilot Role – Your Assistant

Copilot serves as a personal assistant, providing private insights, summaries, and answers tailored to individual users before and after meetings.

e.g. Recap the meeting so far, what was just agreed

Only visible to *you*

Facilitator Role – Your Meeting Assistant

Facilitator improves group meetings by managing agendas, tracking time, capturing notes, and summarizing decisions in real time.

e.g. @Facilitator add [topic] to the agenda and allocate 10 minutes

Visible to *everyone*

Complementary Use

Facilitator ensures *team alignment and actionable* outcomes, while Copilot enhances *individual productivity and preparation*.

Key Benefits

The Facilitator agent in Microsoft Teams enhances productivity and collaboration by providing real-time summarization of meetings and chats. This AI-powered feature captures ongoing conversations and generates notes instantly, ensuring key points and actions are documented accurately.

					
	Stay on track effortlessly	Never lose a decision or action item	Get answers in the moment	Turn discussions into deliverables	Capture work anywhere
How Facilitator can help	Dynamic agendas, time tracking, and gentle reminders keep meetings focused and productive.	Real time shared notes and automatic task capture ensure clear follow through.	Instantly surface relevant insights from the meeting, your work data, or the web.	Generate documents, summaries, and drafts directly from what was said.	From Teams Rooms to hallway chats, every important moment becomes structured output.

Experience the Benefits today

Activate via Admin Settings

1. Verify licensing:

Users have Microsoft 365 Copilot + Teams licenses

2. Allow the Facilitator app

- Teams Admin Center → Teams apps > Manage apps
- Search **Facilitator** → set to **Allowed**

3. Assign access (recommended)

- Create / update **App permission policy**
- Allow **Facilitator**
- Assign to **tenant, groups, or users**

4. Enable Microsoft Loop

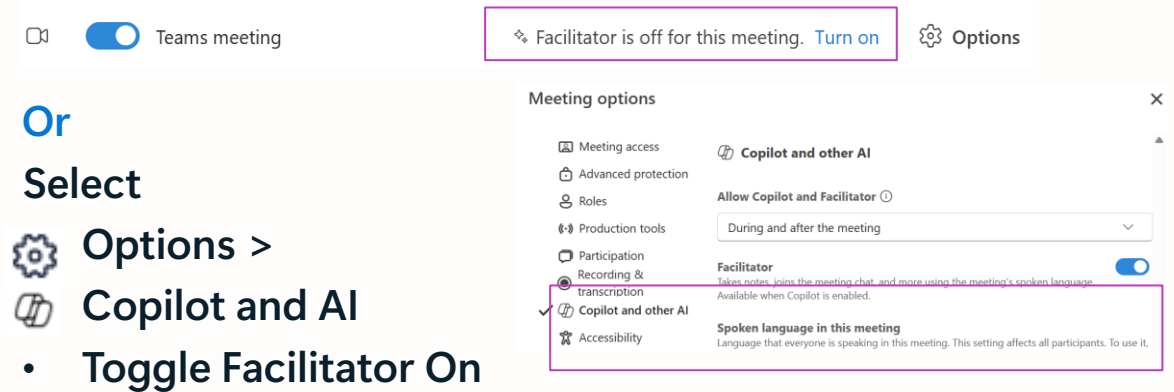
Required for shared AI-generated meeting notes

5. (Optional) Control AI notes

- AI meeting notes enabled by default
- Can be disabled **tenant-wide via PowerShell**

Turn on during scheduling

 Select Turn On Facilitator during meeting creation.



The screenshot shows the 'Teams meeting' creation screen. At the top, there's a toggle for 'Teams meeting' which is turned on. Below it, a message states 'Facilitator is off for this meeting. Turn on' with a link to 'Options'. The 'Options' menu is open, showing various settings. Under the 'Copilot and other AI' section, the 'Facilitator' toggle is turned on. The description for the Facilitator toggle reads: 'Takes notes, joins the meeting chat, and more using the meeting's spoken language. Available when Copilot is enabled.' Below this, there's a section for 'Spoken language in this meeting' with a description: 'Language that everyone is speaking in this meeting. This setting affects all participants. To use it.'

Or

Select

 Options >

 Copilot and AI

- Toggle Facilitator On

Turn on during the Meeting

 Select > More actions ... from the meeting controls.

- Select > Turn on Facilitator from the menu.

Learn more

- [Set up Facilitator in Microsoft Teams - Microsoft Teams | Microsoft Learn](#)
- [Facilitator Video Overview](#)

Coaches

Added agents available to all users, including users of Copilot Basic.



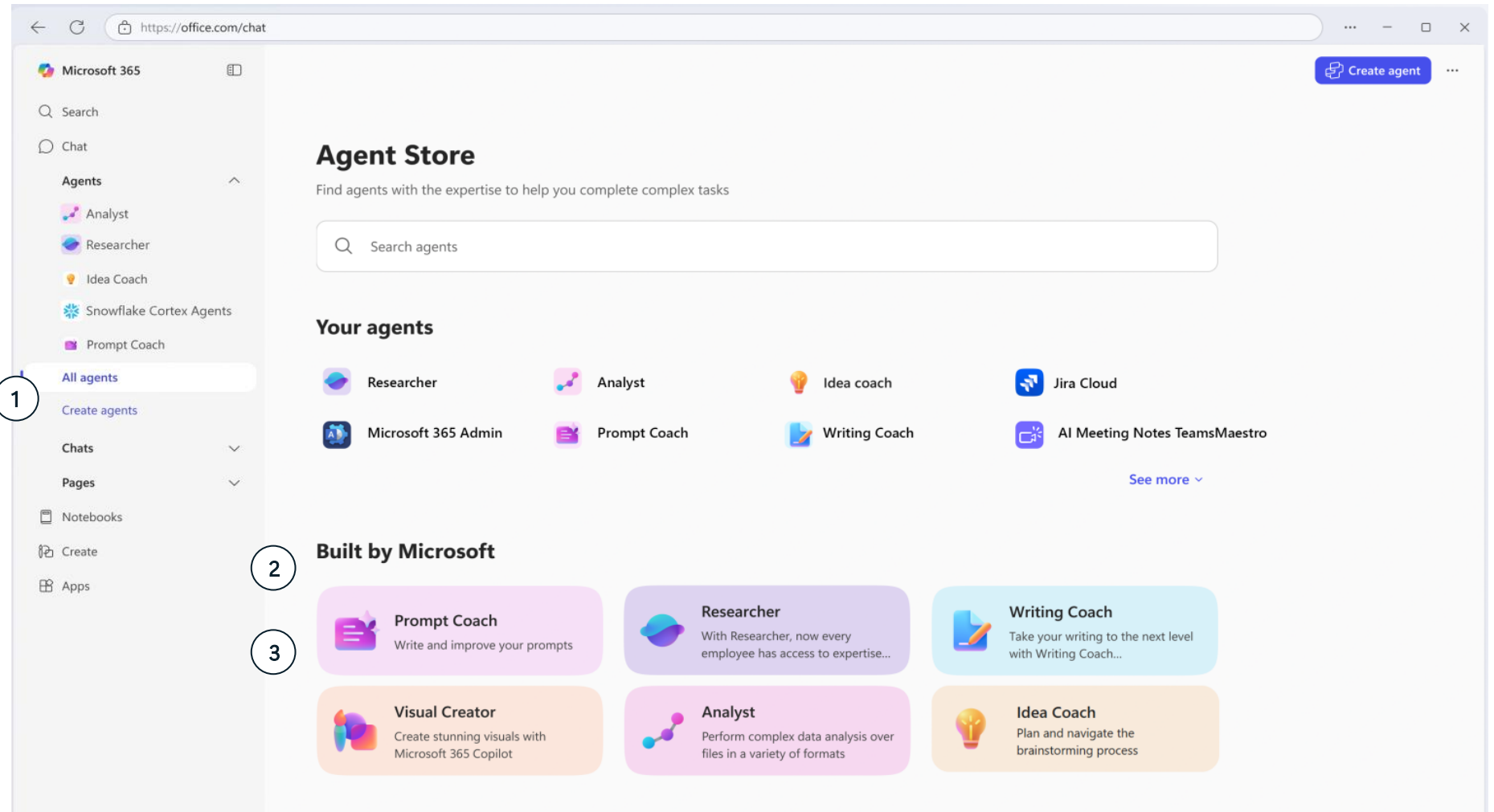
Agent Store

Discover agents from your own organization, Microsoft and partners.

Step 1: View the Agent Store by clicking the “All agents” option on the left rail.

Step 2: Scroll down to the “Built by Microsoft” section to find agents made available to you by your organization.

Step 3: Select one of the “coach” agents to get started. Details for each coach are in the next few slides.



Prompt Coach

A real-time, in-the-flow guide that teaches users how to write better prompts to get higher-quality results from Copilot.

Capabilities

- Interactive prompt guidance to help users develop well-structured prompts through an iterative feedback process that help clarify user goals, context, and expectations.
- Prompt analysis that evaluates and helps refine user prompts to ensure clarity, optimal phrasing, and compliance with Responsible AI guidelines.
- Concrete prompt examples, with step-by-step explanations, to help users

Original Prompt

"Analyze the job description"

Issues with the Original Prompt

1. **Too vague:** It doesn't specify what aspects of the job description should be analyzed (e.g., skills, responsibilities, tone, alignment with a role).
2. **No context:** There's no information about why you want the analysis (e.g., for applying, rewriting, or benchmarking).
3. **No source:** It doesn't indicate where the job description comes from or if you'll provide it.
4. **No expectations:** It doesn't clarify the desired output format (summary, bullet points, recommendations, etc.).

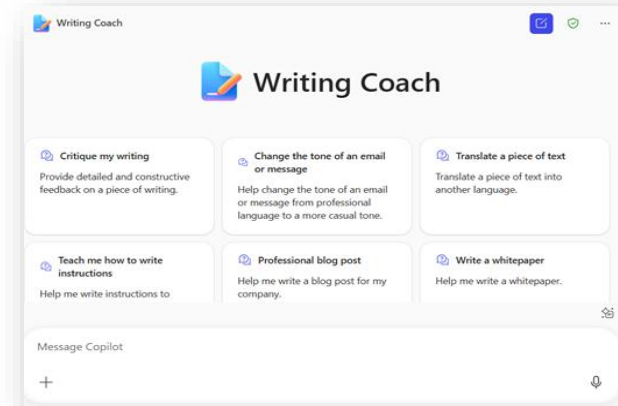
Scenario	Description
Prompt creation	Helps users create effective prompts.
Prompt analysis	Evaluates user prompts and offers detailed suggestions for improvement.
Prompt Compliance	Checks to determine whether prompts follow Responsible AI guidelines.
Prompt Correction	Analyzes and fixes problematic prompts, providing more context for better results.
Prompt Examples	Provides well-structured prompt examples and explains their purpose, context, sources, and expectations to help users learn to improve their own prompts.
Prompt Engineering	Helps tailor prompts to accomplish a particular task by iterating over a prompt and making incremental changes.

Writing Coach

A writing assistant that improves clarity, tone, and structure to help users produce professional, audience-ready content

Capabilities

- Provide detailed feedback on clarity, coherence, grammar, and tone to elevate overall writing quality.
- Help transform casual text and narratives into formal documents, such as instructions and whitepapers.
- Offer specific suggestions to help adjust the tone or style of a document or make it easier to translate a document into other languages.



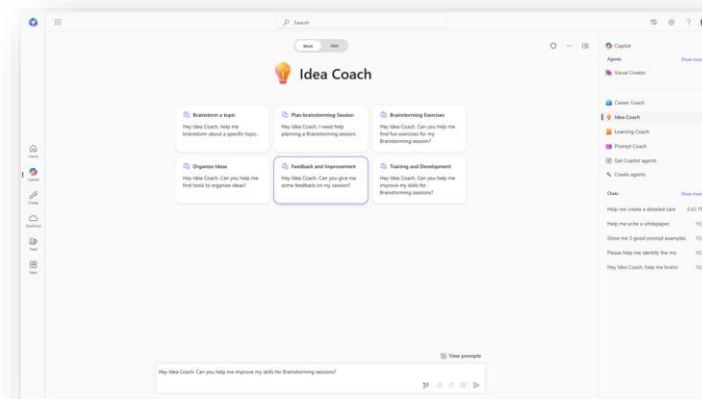
Scenario	Description
Writing refinement	Provides a wide range of suggestions to help users refine their writing. Suggestions can include: ways to improve grammar, clarity, coherence, and key concepts and details to focus on.
Audience targeting	Suggests ways to tailor the voice and tone, and details of a document to your target audience. The agent provides examples of the suggested changes.
Writing for a global audience	Identifies wording that might be culturally sensitive and offers alternatives.
Descriptive and procedural	Provides feature descriptions as well as clear and concise instructions for using products and services.
Customer story writing	Asks customer details and story goals; provides suggestions for structuring the story with a clear beginning, middle, and end.
Creating whitepapers	Provides assistance in identifying the audience, generating topics, and structuring the document.

Idea Coach

A creative brainstorming agent that helps turn vague ideas into clear, actionable concepts using proven ideation techniques

Capabilities

- Provide AI-driven brainstorming through a guided dialogue and creative exercises to help users effectively develop and refine their ideas.
- Customize agendas and exercises for brainstorming based on user input to ensure engaging and productive brainstorming sessions.
- Collect session insights and feedback to iteratively enhance brainstorming techniques and creative outcomes.



Scenario	Description
Brainstorming Assistance	Provides a question-based dialogue to help users brainstorm ideas.
Brainstorm Session Planning	Customizes brainstorming session agendas by gathering context and offering creative suggestions.
Creative Exercises	Proposes activities tailored to user goals and session details.
Idea organization	Provides unbiased tools for prioritizing ideas.
Feedback and Improvement	Collects session feedback and makes recommendations for improving the brainstorming session.
Training and Development	Helps users grow their brainstorming skills.

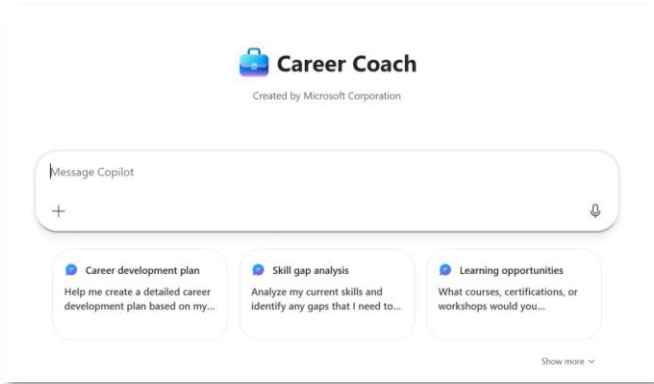


Career Coach

A personalized career development agent that provides tailored suggestions and actionable plans to help users learn, grow, and advance in their careers.

Capabilities

- Personalized career roadmapping with detailed development plans and actionable advice based on the user’s role, skills, and career aspirations.
- Comprehensive skill gap analysis to identify target areas for growth and recommendations for tailored learning opportunities.
- Holistic career support including guidance on career transitions, performance improvement, and strategic networking.



Scenario	Description
Career Development Plans	Creates detailed plans based on your current role and future goals.
Skill Gap Analysis	Identifies gaps in your skills and suggests ways to fill them for career advancement.
Learning Opportunities	Recommends courses, certifications, and workshops to help you grow professionally.
Career Transition Advice	Provides guidance for successfully changing careers and navigating transitions.
Networking Strategies	Offers tips and strategies to leverage your professional network for career growth.
Performance Improvement	Gives advice to improve your performance in your current role to prepare for future opportunities.

Learn More to Accelerate Adoption & Value

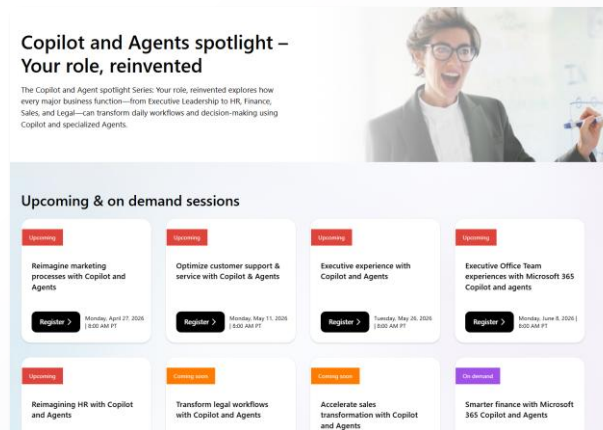
Skill up your organization

Microsoft Skilling

- [AI Skills Navigator](#)
- [Learning Path: Transform your everyday business processes with agents](#)
- [Microsoft 365 Copilot Agent Management Essentials](#)

Stay up to date

Visit [Customer Hub](#) for upcoming sessions and On-Demand videos.



Copilot and Agents spotlight – Your role, reinvented

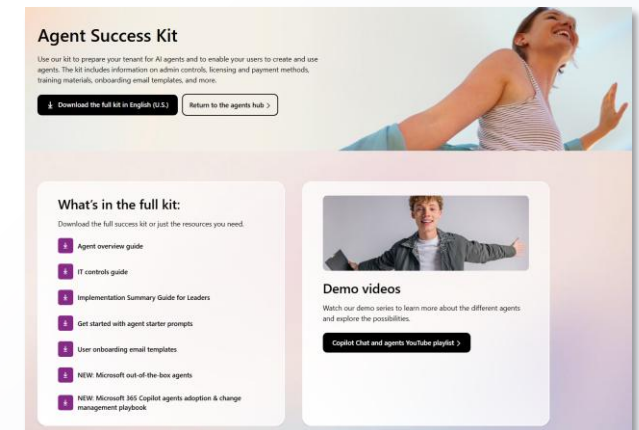
The Copilot and Agent spotlight Series: Your role, reinvented explores how every major business function—from Executive Leadership to HR, Finance, Sales, and Legal—can transform daily workflows and decision-making using Copilot and specialized Agents.

Upcoming & on demand sessions

Session Title	Status	Register / View
Reimagine marketing processes with Copilot and Agents	Upcoming	Register > Monday, April 27, 2026 (1:00 AM PT)
Optimize customer support & service with Copilot and Agents	Upcoming	Register > Monday, May 11, 2026 (1:00 AM PT)
Executive experience with Copilot and Agents	Upcoming	Register > Tuesday, May 26, 2026 (1:00 AM PT)
Executive Office Team experience with Microsoft 365 Copilot and agents	Upcoming	Register > Monday, June 8, 2026 (1:00 AM PT)
Reimagining HR with Copilot and Agents	Upcoming	Coming soon
Transform legal workflows with Copilot and Agents	Upcoming	Coming soon
Accelerate sales transformation with Copilot and Agents	Upcoming	Coming soon
Smarter Finance with Microsoft 365 Copilot and Agents	On demand	View >

Land agent adoption

Leverage the [Agent Success Kit](#)



Agent Success Kit

Use our kit to prepare your tenant for AI agents and to enable your users to create and use agents. The kit includes information on admin controls, licensing and payment methods, training materials, onboarding email templates, and more.

[Download the full kit in English \(U.S.\)](#) [Return to the agents hub >](#)

What's in the full kit:

Download the full success kit or just the resources you need.

- 1 Agent overview guide
- 2 IT controls guide
- 3 Implementation Summary Guide for Leaders
- 4 Get started with agent starter prompts
- 5 User onboarding email templates
- 6 N/A: Microsoft out-of-the-box agents
- 7 N/A: Microsoft 365 Copilot agents adoption & change management playbook

Demo videos

Watch our demo series to learn more about the different agents and explore the possibilities.

[Copilot Chat and agents YouTube playlist >](#)