

# Webinar

From vision to value with AI Agents  
in Microsoft Copilot Studio

Thursday, December 4th, 2025



# Today 's Team



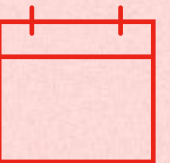
Filipe Mello de Souza  
**Technical Architect**



Angelo Dalle Molle  
**Global CMO**

# Agenda

- The AI Revolution and the New Enterprise Stack
- Modernize the way your business works — one intelligent agent at a time
- Key AI KPI 's for your decision
- Key takeaways



# Who is AlfaPeople

- Your leading Microsoft Dynamics 365 partner



**Europe:** Denmark, Germany, Spain, Switzerland

**North America:** USA, Canada

**Asia:** China, Saudi Arabia, United Arab Emirates

**Latam:** Brazil, Chile, Costa Rica, Colombia, Ecuador, Guatemala, Mexico, Paraguay, Peru, Uruguay

- Present in 18+ countries
- 650+ employees globally
- 450+ Microsoft-certified consultants
- Offshore team in India and LATAM
- 500+ active customers globally



INNER CIRCLE  
FOR MICROSOFT AI BUSINESS SOLUTIONS

**Top 1%** of worldwide Partners.

Part of the Inner Circle for the **last 16 years** and received several awards.

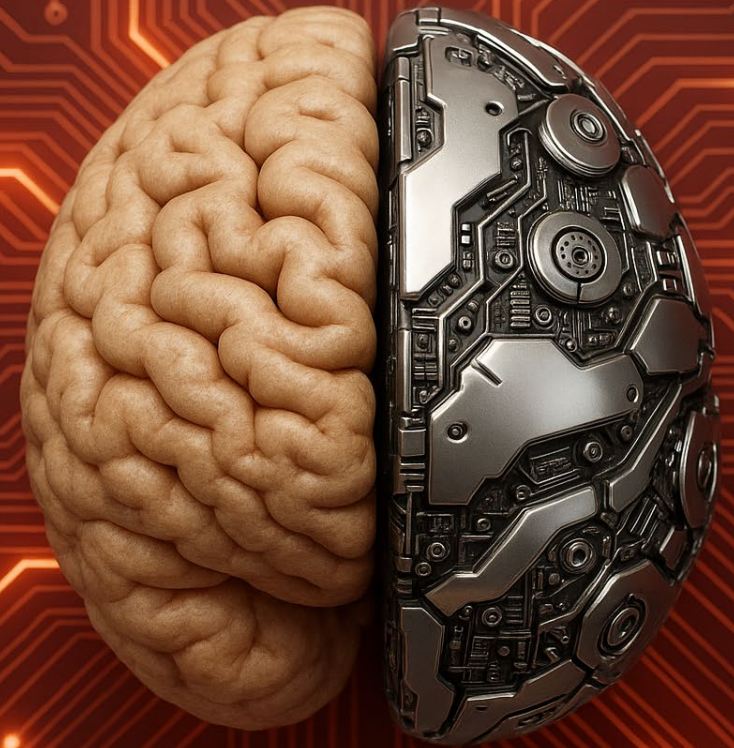
# The AI Revolution and the New Enterprise Stack

How intelligent Agents are redefining work, productivity, and innovation

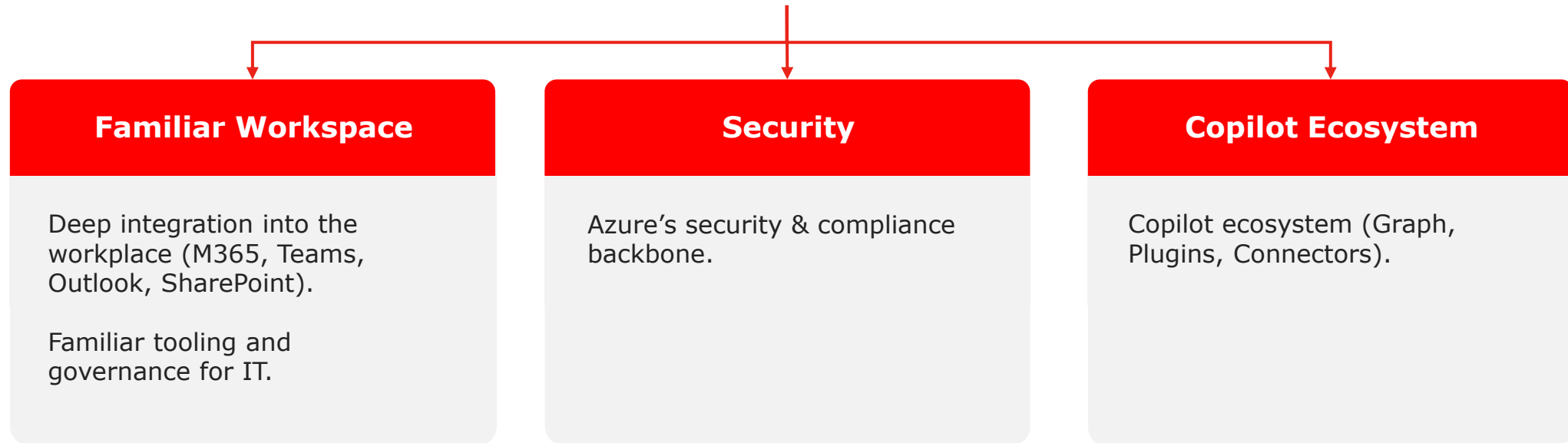


# Every Company is Becoming an AI Company

- **Autonomous**
- **Integrated**
- **Secure**
- **Business-aware**



# Why Microsoft is the Best Choice For Your Users and For Your Company

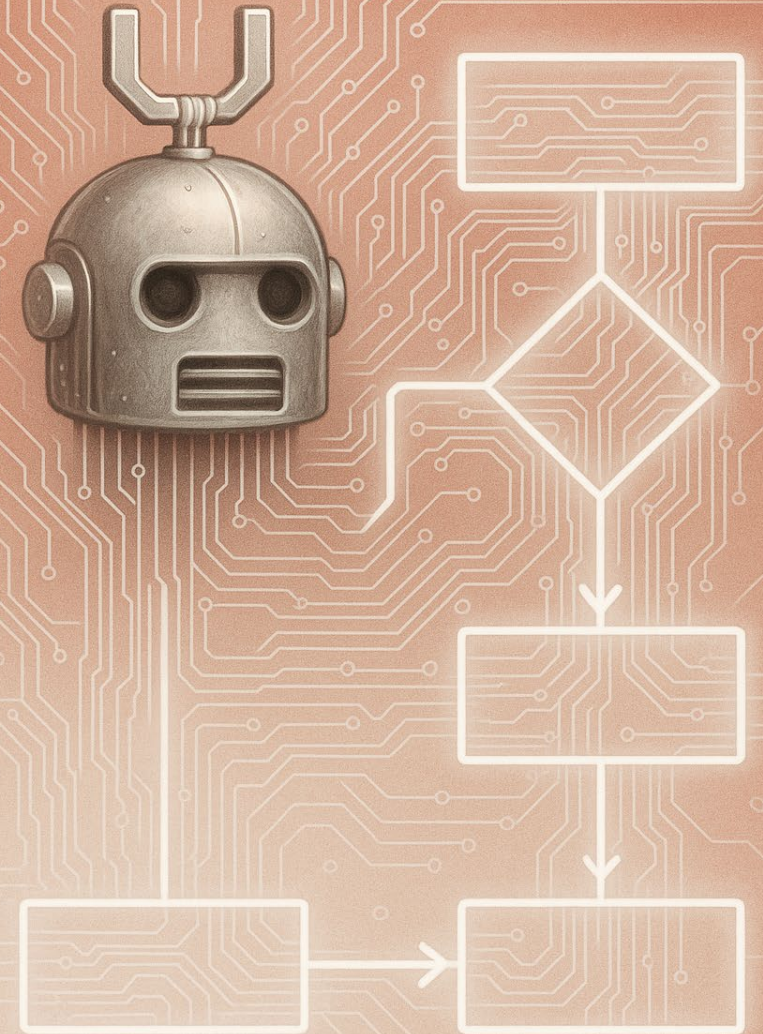


The market is flooded with tools, but only Microsoft deliver enterprise-grade reliability, governance, and smooth integration with M365.

## What is a bot?

A bot is a rule-based, task-oriented system designed to respond to predefined questions or commands. It operates within a narrow scope, follows scripted logic, and lacks the ability to truly understand context, intent, or past interactions. Bots execute instructions precisely, but they cannot reason, adapt, or autonomously handle complex scenarios.

**Bots leaves us frustrated**



## What is an agent?

An AI Agent is an autonomous digital worker that understands goals, takes action, connects to your systems, and continuously learns — all with enterprise security built-in.

**goal-driven**

**can execute workflows**

**memory context**

**Agents makes us satisfied**



# Ready-to-use or custom

## Ready-to-use

Ready-to-use agents are already available on some Dynamics licenses. Some examples are.

**Customer Intent Agent**

**Customer Knowledge Management Agent**

**Quality Evaluation Agent**

**Case Management Agent**

## Custom agents

Your own agent built with Copilot Studio

Agents Already Changing the Enterprise — The Microsoft Portfolio



# Modernize The Way Your Business Works — One Intelligent Agent at a Time

Modernize processes with real AI autonomy in  
Microsoft Copilot



# Modernize Processes With Real AI Autonomy in Microsoft Copilot



## The Business Case

### Problem

EV Car Shop is a high-end EV Auto Sales and Service Facility in San Francisco CA. In addition to performing maintenance and repairs, the mechanics have been asked to answer phones and schedule customers as well. Currently, customers are unhappy with hold times, rushed calls, incorrect information, and endless ringing. The supervisor in charge of customer satisfaction has zero visibility into the customer experience.

### Solution

Josh, the owner of EV Car Shop, decides to create a Scheduling Agent to handle all incoming customer calls. His goal is to ensure the agent can instantly answer the most frequently asked questions, and seamlessly schedule maintenance appointments for their customers. After researching, Josh selects Microsoft Copilot Studio to create the Agent.



# Modernize Processes With Real AI Autonomy in Microsoft Copilot

## Customer



**Filipe Souza**

This is Filipe Souza, a customer who bought a car from EV Car Shop

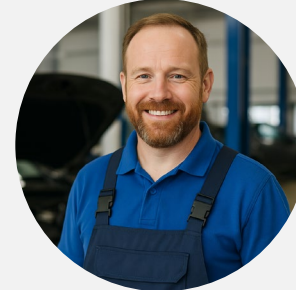
## Agent



**Alfred**

This is Alfred, the smart agent created to replace Mike in scheduling customer appointments

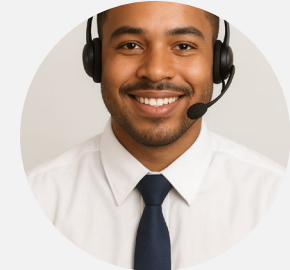
## Workers



**Mike**

This is Mike, an EV technician who also answers and schedules customer's maintenance. Customers are upset with this process.

## Supervisor



**James**

This is EV Car Shops Customer Service Manager, James. He has no clear analytics on how many customers are dissatisfied

# Modernize Processes With Real AI Autonomy in Microsoft Copilot

**Customer**



**Filipe Souza**

## **What Does Filipe Need?**

Filipe need to schedule his first maintenance appointment. He also has a broken charger at home, and really needs to top up the batteries. Its a cold day in San Francisco, and he's also thinking about a cup of coffee...

This is a fully unstructured conversation. Let us see how Alfred handles this.



# Modernize Processes With Real AI Autonomy in Microsoft Copilot

## Agent



**Alfred**

### How the Agent was built?

The agent was built with Microsoft Copilot and full generative Capabilities. He was powered with an LLM so he can better understand and reason with the Customer.

Creating a similar bot is something simple in Microsoft Copilot. Let ´s check some of the nice Microsoft Copilot capabilities

# Three Pillars of Prompt Engineering

## Persona

A clear persona shapes tone, attitude, knowledge level, and communication style. When the AI knows its identity, the conversation becomes consistent, natural, and aligned with your goals.

## Task

Describe exactly what the AI must do. This includes the action, the expected outcome, and how success should look. A well-defined task removes ambiguity and ensures the model focuses on the right objective.

## Constrains

Set the boundaries the AI must follow. Constraints include what the AI cannot say, cannot assume, cannot invent, or must avoid. They create safety, accuracy, and reliability — especially in enterprise scenarios.

- Home
- Create
- Agents
- Flows
- Tools


# Describe your agent to create it

- Helpdesk
- Expense tracking
- HR and benefits


Use everyday words to describe what your agent should do

Features labeled as 'preview' are subject to supplemental terms. [See terms.](#)

## Recent agents See more


Name	Type	Last modified	Last published	Owner	Protection status
 SociAI Ally	Agent	# Microsoft Copilot Studio 18 days ago	Never	Filipe Mello de Souza	--

## Explore agents See more




**Website Q&A**  
Agent template

Instantly answer user questions using the content of your website or other knowledge.




**Voice**  
Agent template

An agent with voice capabilities.




**Safe Travels**  
Agent template

Provides answers to common travel questions and related health and safety guidelines.




**Financial Insights**  
Agent template

Help financial services professionals get quick and concise info from their org's financial documents and other available resources.



**Benefits**  
Agent template












Benefits Agent provides personalized information on various benefits offered by the employer that are tailored to employee's unique circumstances.



**IT Helpdesk**  
Agent template

Empowers employees to resolve issues and effortlessly create/view support tickets.

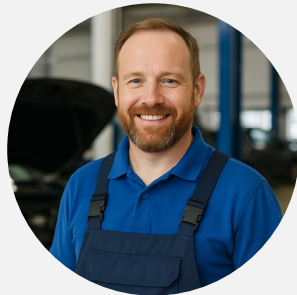
## Learning resources

-  Free Copilot Studio Workshop
-  Getting started with Copilot Studio
-  Quick start: Create and deploy an agent
-  Documentation
-  Security and Governance
-  Responsible AI FAQs
-  Quick start: Use Generative AI in an agent
-  Support community
-  Coming soon: See release plans
-  What's new: See release notes
-  Agent Message Consumption Estimator



# Modernize Processes With Real AI Autonomy in Microsoft Copilot

## Workers



Mike

### How is Mike affected?

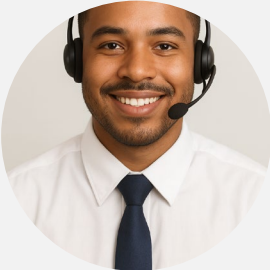
Mike is happy and can focus on taking care of cars, and their human owners without having to stop every 5 minutes to answer the phone.

# The workers are happier and more focused



# Modernize Processes With Real AI Autonomy in Microsoft Copilot

**Supervisor**



**James**



## Key KPI Metrics

# Key AI KPI 's for your decision

Start now



# Start impacting your business today

**353%  
ROI**

Over 3 years

**29%**

Faster information retrieval

**3x  
faster**

Solution development  
with low-code

# Key take-aways

**Building Agents** for your Business Processes is easier than you (probably) think.

Using Power Platform components, you can **integrate AI** into your Processes with low code.

You may also use Azure services to integrate **custom-developed solutions** and third-party models.

# GIVEAWAY: AI & Copilot Assessment Workshop



This workshop provides an AI integration roadmap fostering innovation, efficiency, strategic growth, operational readiness, and ethical practices, transforming challenges into competitive opportunities.

1-day workshop, On-site or Online.

The workshop is designed for managers, IT decision-makers, process owners, and data analysts.

[Read more!](https://alfapeople.com/ai-assessment-workshop-2/)

<https://alfapeople.com/ai-assessment-workshop-2/>

## Sessions in the Workshop:

- **Introduction to Microsoft technologies:**  
Exploring Microsoft AI, Copilots, and Azure services to enhance efficiency and address business challenges.
- **Use Case Exploration:**  
We will explore use cases and identify challenges and priorities for strategic impact in your organization.
- **Design Thinking:**  
Design Thinking session focuses on AI solutions, quick wins, ROI, consensus, and prioritizing value creation.
- **Organizational Readiness:**  
Discussing AI integration, emphasizing data quality, change management, training, governance, and ethical AI practices.
- **Roadmap and Next Steps:**  
Outlining a roadmap for AI adoption to accelerate your organization's journey.

# GIVEAWAY: Copilot in a Day

**Copilot in a Day is an exclusive, hands-on experience** led by AlfaPeople's expert consultants, designed to showcase the real value of Microsoft Copilot.

Discover how to configure, customize, and apply its advanced features to streamline workflows, boost productivity, and turn data into actionable insights.

More than a demo, Copilot in a Day is an inspiring journey that gives your team practical know-how, sparks new ideas, and reveals how Microsoft AI can transform the way you work—today and in the future.

## Introduction

- The current role of AI in productivity and business transformation;
- General concepts of AI, including Generative AI, and its application in the business environment;
- Overview of Copilots within Dynamics 365 and other platforms;
- Functionalities and benefits specific to <<name of specific Copilot>>.
- Copilot Studio's role in customizations, extensions and integrations;
- Overview of Azure AI Services and its fundamental architecture.

## Practical demonstration

- Demonstration of how the technologies work in practice in a demo session guided and presented by the AlfaPeople trainer. Due to configuration restrictions, participants will follow the presentation without interaction at this time.
- Presentation of exemplary use cases in productivity and processes.
- Demo with <<specific Copilot name>>: settings, features and customizations.
- Other complementary tools and integrations with other platforms

## Closing

- Q&A.
- Next steps.

[Read more!](#)



## Contact us

Phone: +45 70 20 27 40

Email: [info@alfapeople.com](mailto:info@alfapeople.com)