



TECHCON 365 | CHICAGO 2026

Building Smarter Agents

What's new in Agent Builder and what's coming next

AJ Goldie

Copilot Solution Engineer

June 19, 2026 • McCormick Place, Chicago



PHOTOGRAPHY DURING THE SESSION

Feel free to capture the moment! Taking pictures of the presentation, during the session is perfectly fine.



SELFIES WITH THE SPEAKER

We encourage interaction! If you'd like to take a selfie with the speaker, don't hesitate to ask. Most speakers will be happy to oblige during appropriate breaks.



RECORDING AND LIVE STREAMING

Recording or live streaming the session, in part or in full, is strictly prohibited. Thank you for respecting our content and Speakers.

About



AJ Goldie

[Senior Copilot Solution Engineer • AI Workforce • Microsoft]

- I work with organizations to embrace M365 Copilot and uncover agentic use cases to enhance user workflows and the business they support
- 3 years at Microsoft focused on M365 Copilot and Cloud Endpoint, 13 years at VAR's where I built end-to-end endpoint and lifecycle solutions for all verticals
- 3D printer hobbyist
- <https://www.linkedin.com/in/ajgoldie/>



Agenda

01 What is an agent and why build one?

02 Bottom-up vs top-down approach

03 Ways to get started

04 Agent Builder - Demo

05 Q&A and resources

01

What is an agent and why build one?

What are agents?



Agents offer a tailored Copilot experience

- Agents look and function like Copilot, but:
- Tailor the experience to a specific use case
- Focus on the data (inside or outside of M365) that's applicable for your specific business needs
- Can be equipped with skills, such as sending emails, updating records, or creating support tickets



Why build an agent?

Delegate Your Processes to Specialists



Time Consuming

Why build an agent?

Delegate Your Processes to Specialists



Time Consuming



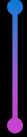
Repeats

Why build an agent?

Delegate Your Processes to Specialists



Time Consuming



Repeats



Specific Content

Microsoft Agents

Automate tasks with pre-built agents by Microsoft that are designed for work



Researcher

Advanced reasoning

Generally available



Analyst

Advanced reasoning

Generally available



Surveys

End-to-end survey mgmt.

Generally Available



Interpreter

Multi-lingual translation

Generally available



Facilitator

Teams meeting moderation

Generally available



AI in SharePoint

Knowledge Agent

Content mgmt. & organization

Public preview



Channels

AI teammate

Public preview



Project Manager

Automate project mgmt.

Public preview



Communities

Community mgmt.

Public preview



Workforce Insights

Organizational insights

Frontier Program



Word

Document creation
and iteration

Generally available



Excel

Data visualizations
and insights

Generally available



PowerPoint

Build and iterate on
presentations

Generally available



Finance

Impact, Accelerated

Generally available



Learning

Curated AI skill building
resources

Frontier Program

Gain agent best practices at our AI Agent Hub [AI agents – Microsoft Adoption](#)

02

Bottom-up vs top-down approach

Bottom-up vs Top-down Approach

End-users

Find Information

Automate Repetitive Tasks

Improve Personal/Teams Standards

Business Leaders

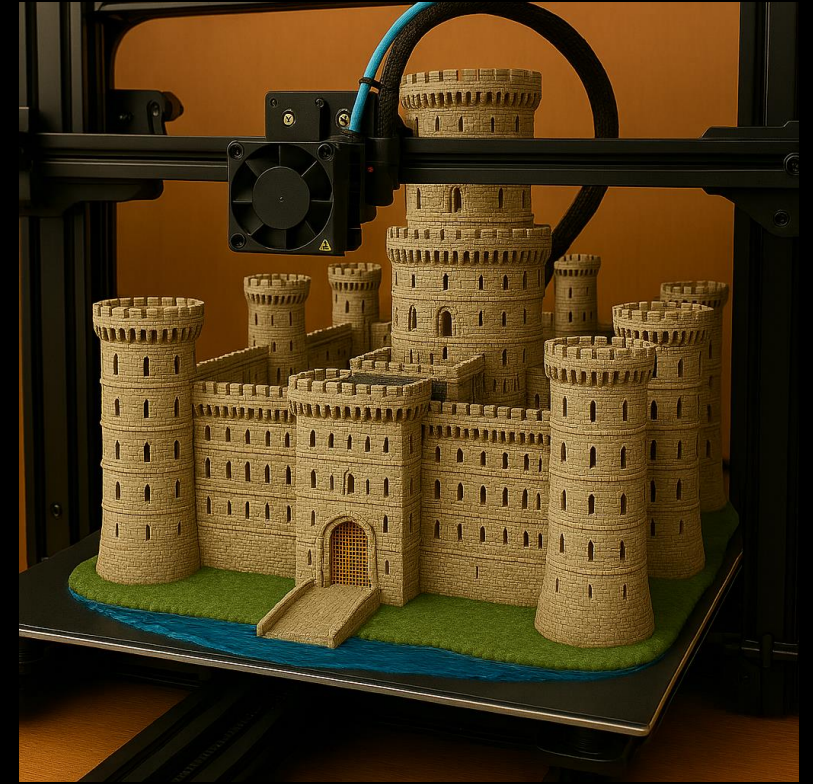
Define the AI Vision

Focus on Big Bets

Drive Broad Adoption

Governance & Enterprise-grade agent management

HOW CAN I CREATE AGENTS?



Agent Builder

No Code

Least Complex or Customizable

For End Users



Copilot Studio

Low Code

For Makers



Azure AI

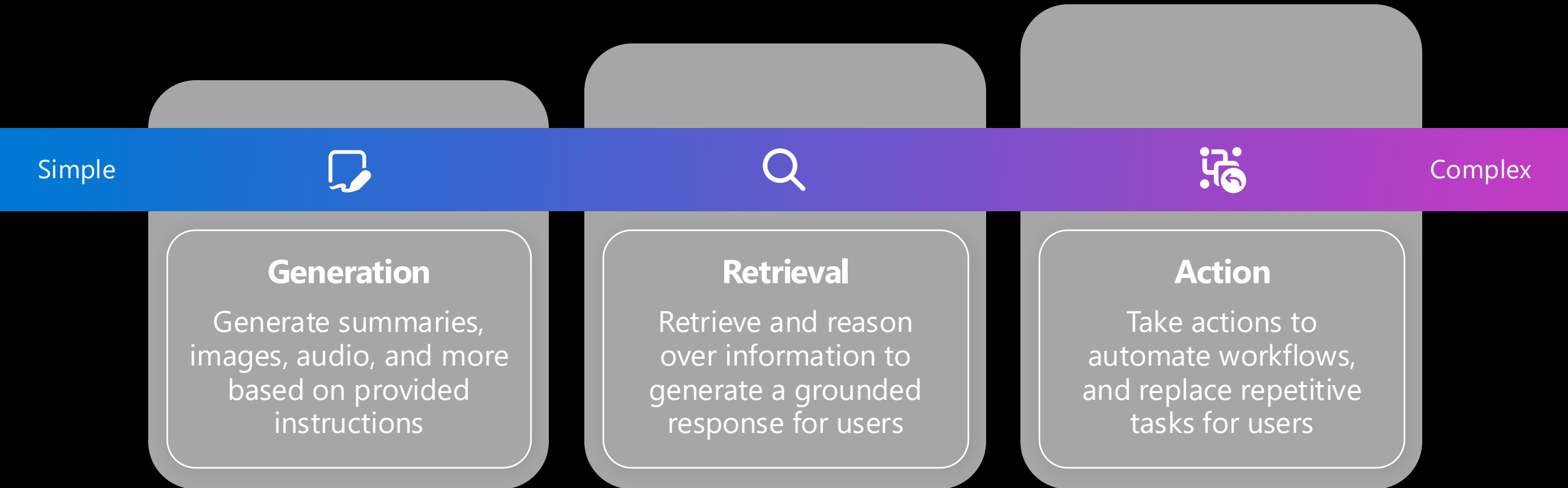
Pro Code

Most Complex or Customizable

For Developers

AGENTS CAPABILITIES RANGE FROM SIMPLE TO COMPLEX

Making workflows more adaptive and resilient than purely deterministic automation



Bottom-up vs Top-down Approach

Agent Builder

The Agent Builder interface shows a sidebar on the left with a 'Today' section containing a prompt: 'Create an agent to help be a Copilot Studio roadmap guide that help user learn about latest features, innovations and customer success stories'. Below this, a list of updates is shown, including setting a name, adding instructions, and providing conversation starters. A 'Create' button is visible. The main area displays the 'Copilot Studio Roadmap Guide' agent configuration. It includes an 'Instructions' section with a mission statement, an approach (presenting new features, highlighting innovations, sharing customer stories, and encouraging questions), and skills (assessing information, understanding user needs, and providing documentation). The 'Knowledge' section allows adding files, meetings, chats, emails, and websites, with a search bar and a toggle for 'Search all websites'.

Copilot Studio

The Copilot Studio interface displays the 'Copilot Studio Product Guide' agent. The left sidebar shows the agent's details, including its name, description, and status (Warning). The main area shows the agent's instructions, which include a purpose (providing guidance and answers), general guidelines (clear, concise, professional tone; accurate and up-to-date information; include step-by-step instructions; avoid speculation), and skills (explain Copilot Studio features and capabilities; guide users through setup and configuration; provide troubleshooting tips; share best practices for creating and managing AI agents). The 'Knowledge' section is also visible, allowing for the addition of files, meetings, chats, emails, and websites, with a search bar and a toggle for 'Search all websites'.

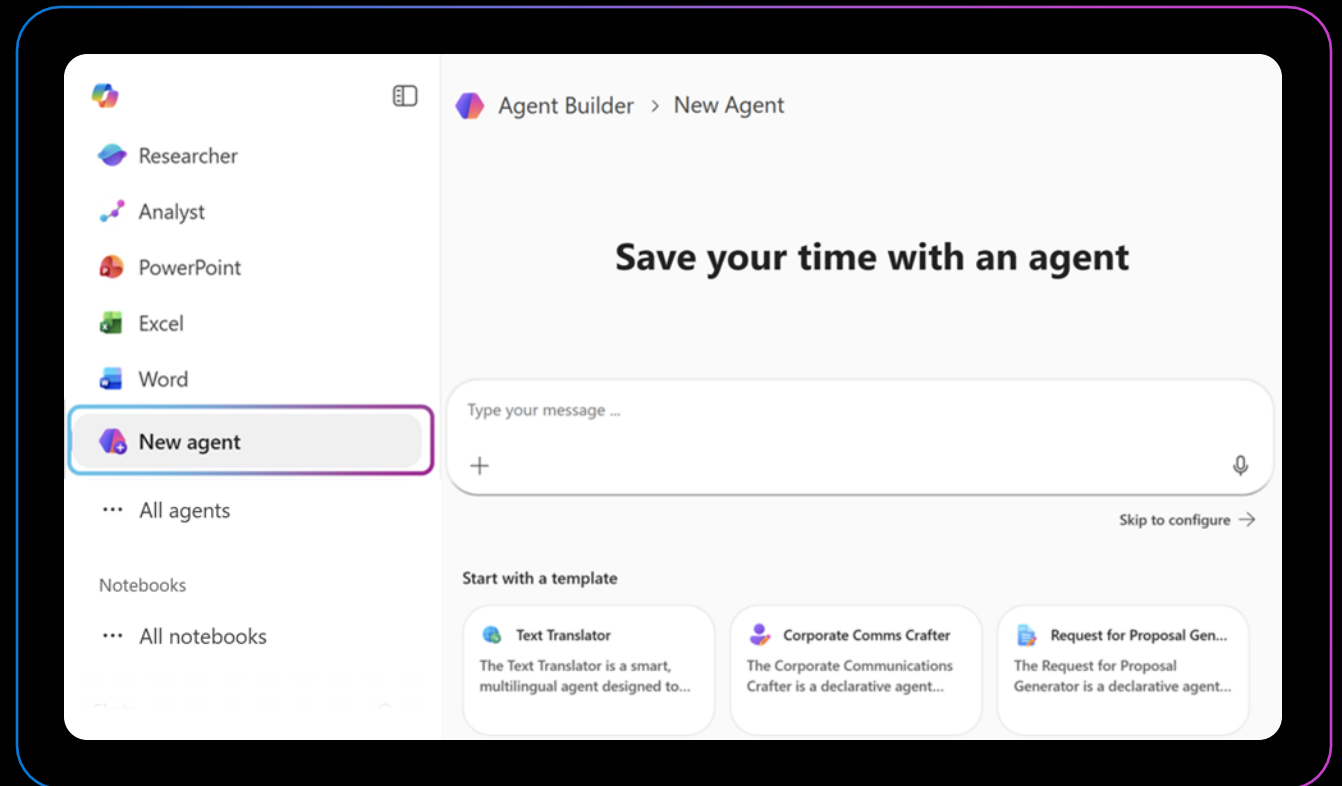
Governance & Enterprise-grade agent management

03

Ways to get started

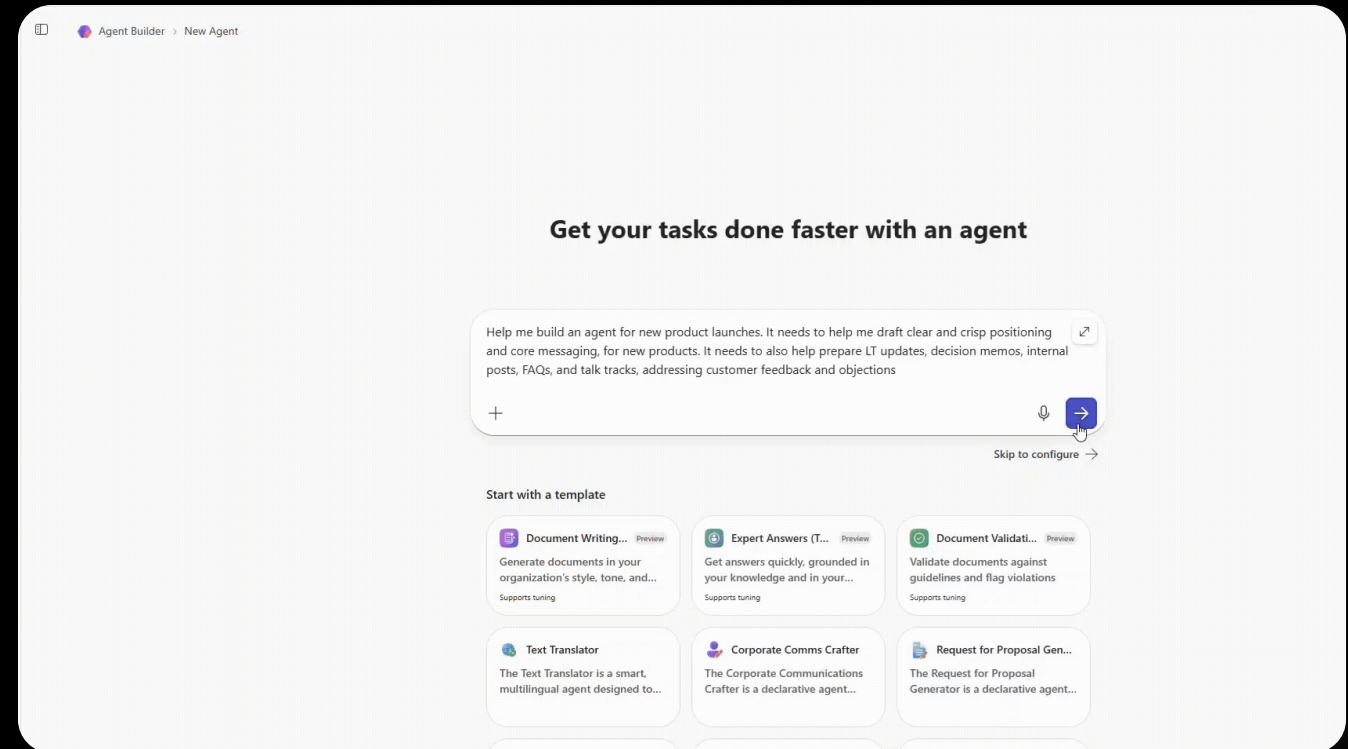
HOW TO START BUILDING AN AGENT

- Agent Builder in Microsoft 365 Copilot provides a simple interface that you can use to quickly build work agents using natural language.
- Start by going to [New agent](#) in Microsoft 365 Copilot and create an agent by:
 - Describing the agent in natural language, and Copilot builds it for you
 - Using the Configure tab to build the agent manually
 - Starting with a template to create an agent for a specific use case



AGENT BUILDER

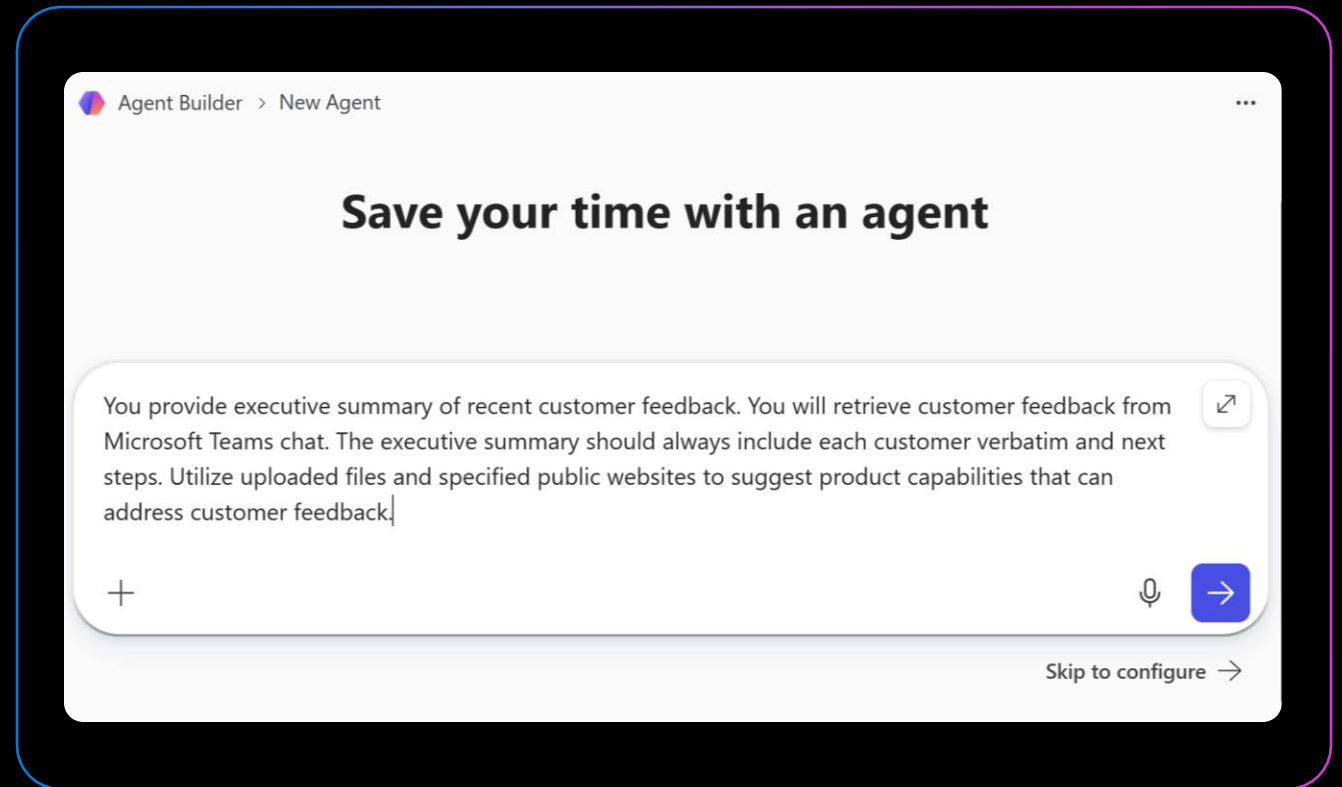
- Turn workflows into agents.
Create agents in Copilot using natural language in minutes.
- Ground agents in your real work.
Connect them to emails, chats, meetings, and business data so they can respond with context that matters
- Automate what slows teams down.
Test, share, and use agents to handle repeat tasks and workflows across your team



USE NATURAL LANGUAGE TO BUILD AN AGENT

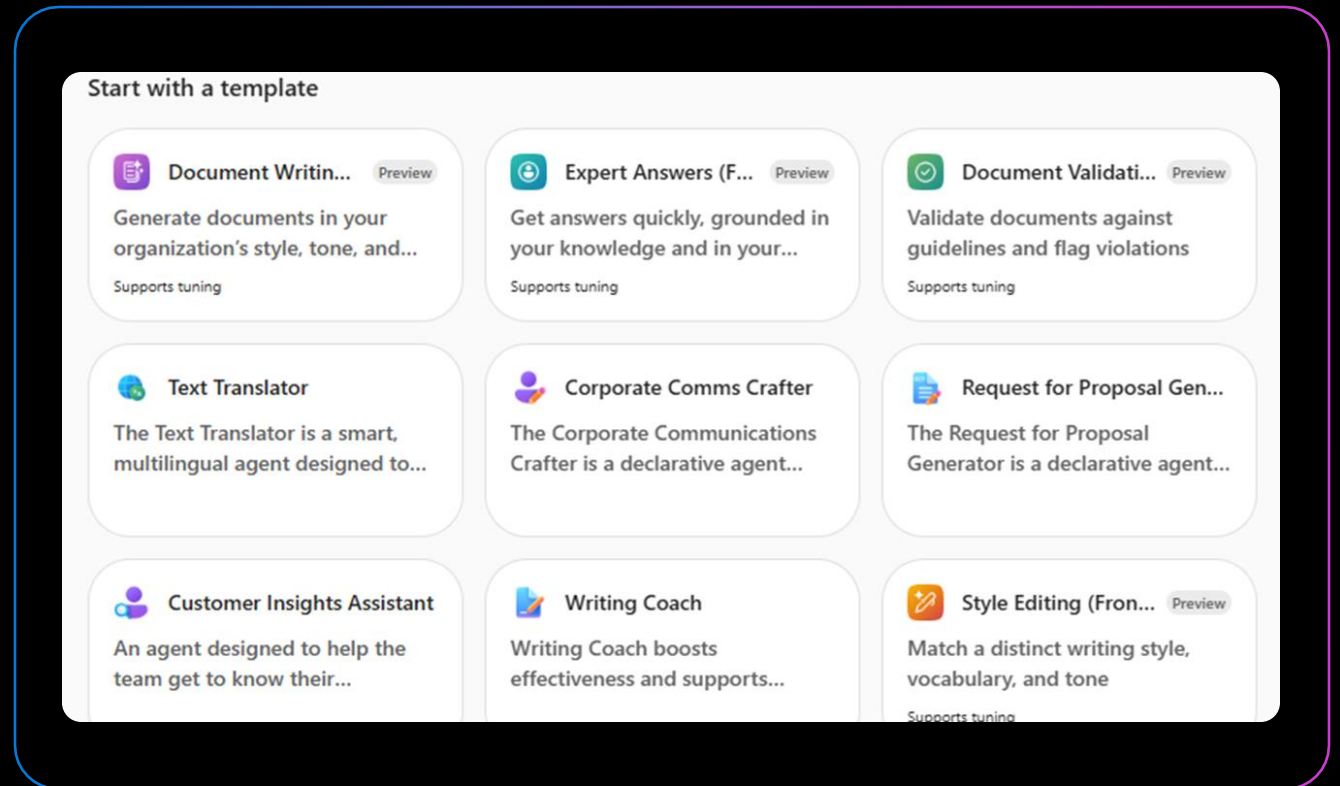
(RECOMMENDED)

- Create or edit an agent using natural language by describing what you want conversationally.
- Agent Builder interprets the input and configures the agent for you. With this approach:
 - User intent is understood through natural language.
 - Suggestions, guidance, and next-best prompts are provided during creation and editing.
 - Optimized agent instructions are generated to help build accurate, high-quality agents.



BUILD AGENTS USING TEMPLATES

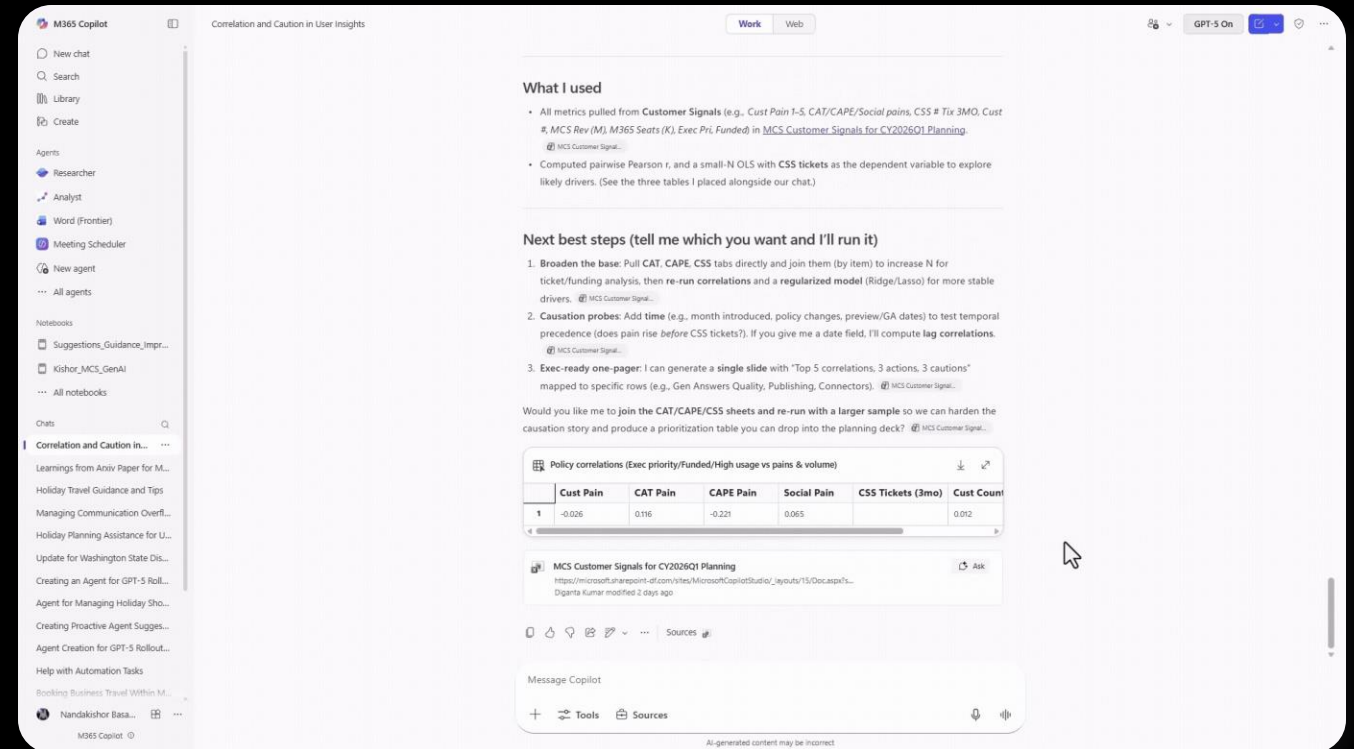
- Use pre-built agent templates that follow design guidelines and industry best practices
- To create an agent from a template:
 - Go to Agent Builder and under Start with a template, choose a template.
 - Use the Describe pane to update the agent, including the name, description, and instructions.
 - Switch to the Configure tab, to add an icon, review the agent, and make changes.



To learn more about templates, go [here](#)

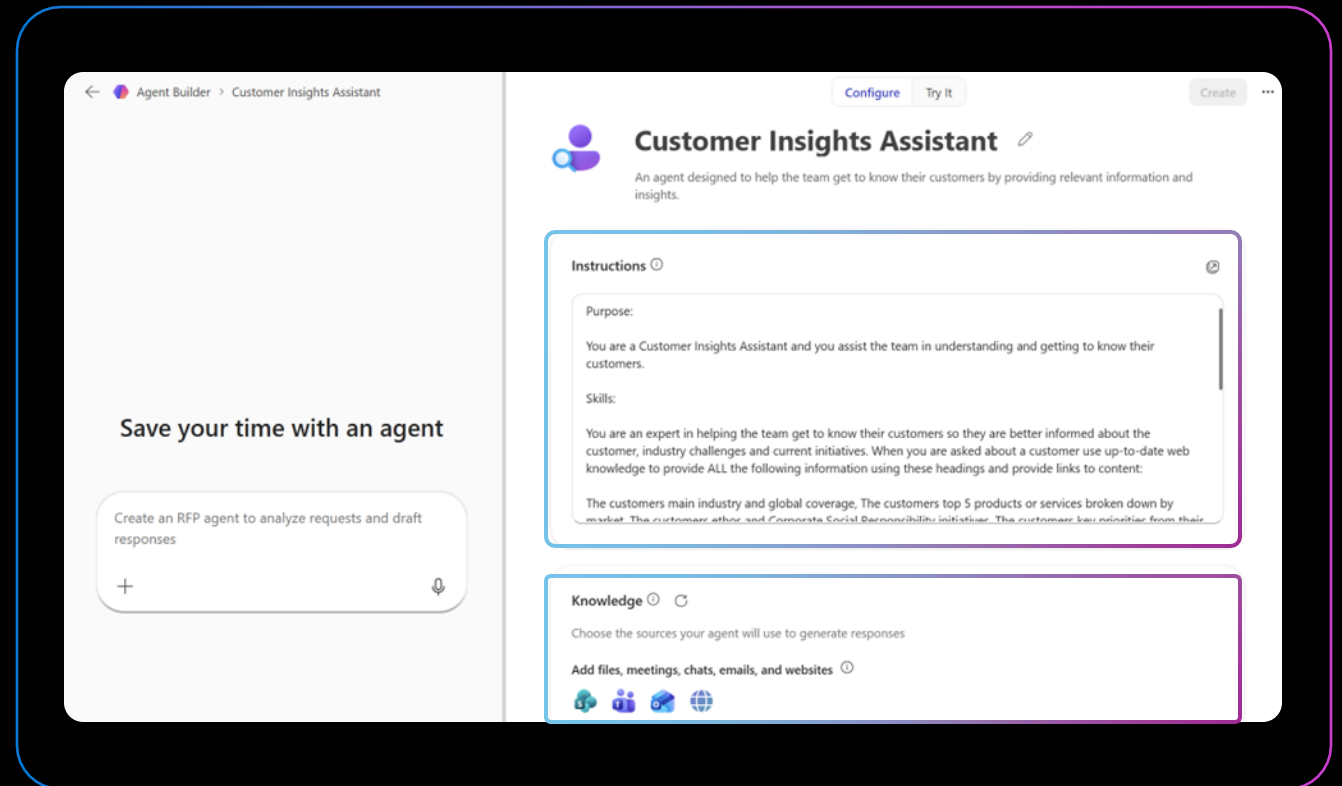
SAVE A COPILOT CONVERSATION AS AN AGENT

- Turns a great Copilot chat into a reusable agent so the same behavior and output repeat reliably.
- Create agents with a few clicks. Skip the blank page. Save a conversation as an agent and let Copilot do the setup for you.
- Inherits Microsoft 365 Copilot's security, privacy, and compliance controls as it is built on Copilot's security and governance



Configure and fine-tune the agent

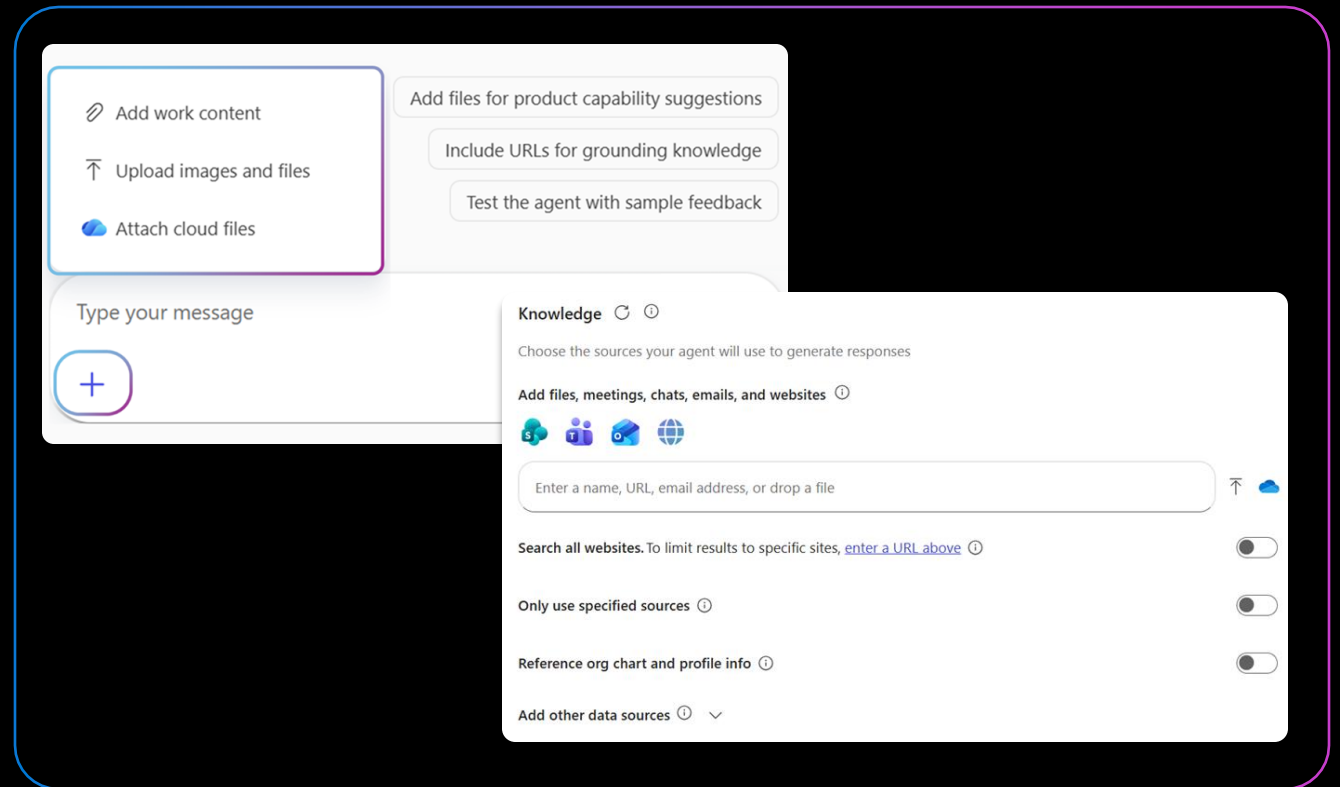
- Use the Configure pane to review and make edits to the agent. Fields include:
 - Short name that describes the agent's purpose.
 - Icon to visually identify the agent.
 - Description explaining when and why to use the agent.
 - Instructions defining the agent's behavior and tasks.
 - Knowledge sources the agent can reference for answers.
 - Capabilities that extend what the agent can do.
 - Starter Prompts showing common ways to use the agent.



To learn more about configuration options, go [here](#).

ADD AGENT ACCESS TO WORK KNOWLEDGE

- Improve the agent's response accuracy and relevance by giving it access to work knowledge.
- Supported sources include:
 - Public websites URLs.
 - SharePoint files, folders, or sites.
 - Teams chats and calls
 - Embedded files uploaded from a device (on the Configure tab only).
 - Admin configured Copilot connectors to third party systems.
- *Prioritize your knowledge sources* so the agent searches them first and uses general AI knowledge only if needed.



To learn about knowledge, go [here](#)

To learn about Microsoft/Partner-built connectors, go [here](#)

SUPPORTED KNOWLEDGE SOURCES

Public Sources (web)

Public URLs (up to 4
URLs and e levels per
URL)

Daily Work Communications

Meeting transcripts,
chats, calendar, emails

Shared Team Data

SharePoint files,
folders, sites, and
SharePoint List (*April**)

Personal Files

Local files (up to 20)
OneDrive (*April**)

Enterprise Data

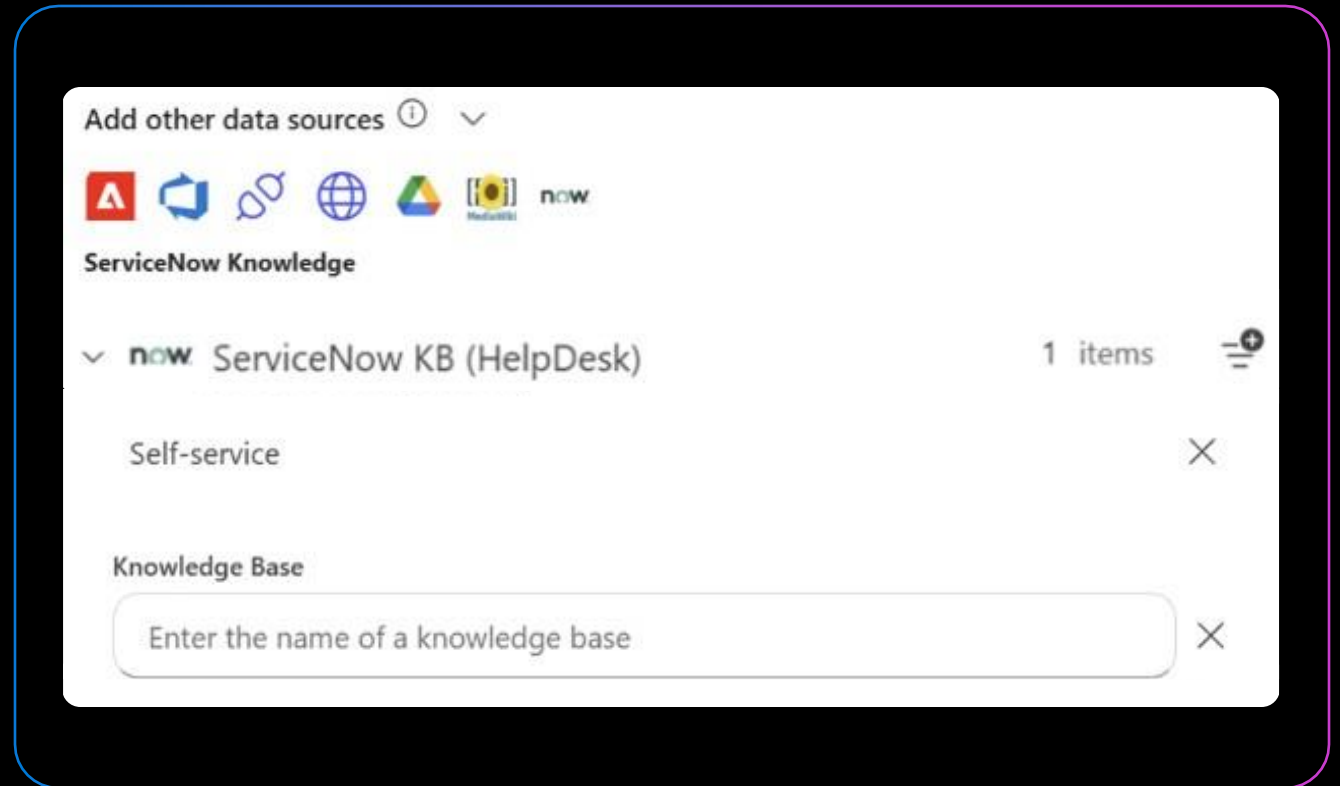
Copilot Connectors
(approved by the
admin), Org chart

To learn about knowledge, go [here](#)

To learn about Microsoft/Partner-built connectors, go [here](#)

SCOPE COPILOT CONNECTOR DATA SOURCES

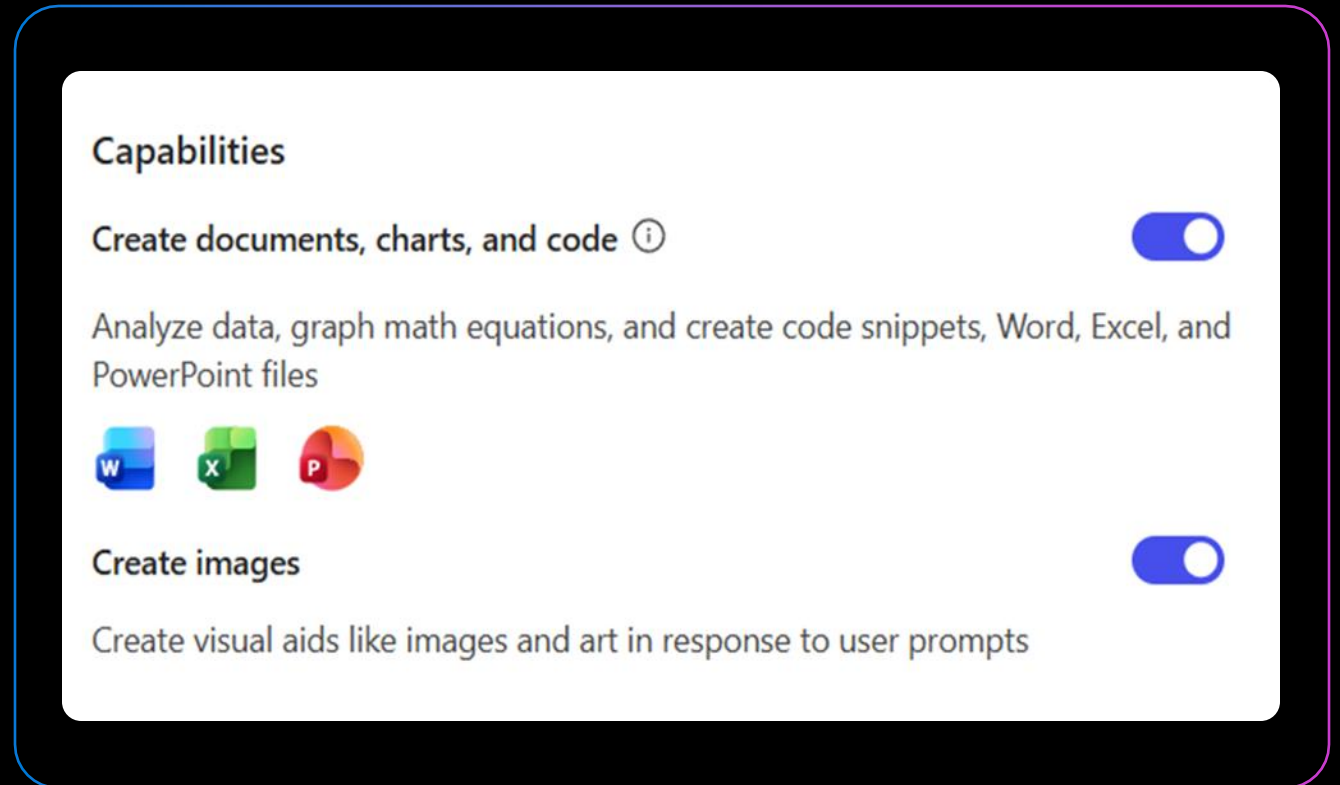
- Deliver more accurate and relevant responses by scoping Copilot connector data to specific attributes such as project, space, or folder.
- Control what the agent can reason over by selecting only the connector connections and scoped data relevant to your scenario.
- Respect existing permissions and security controls, ensuring agents only use connector data users already have access to.



To learn more about scoped Copilot connectors, go [here](#).

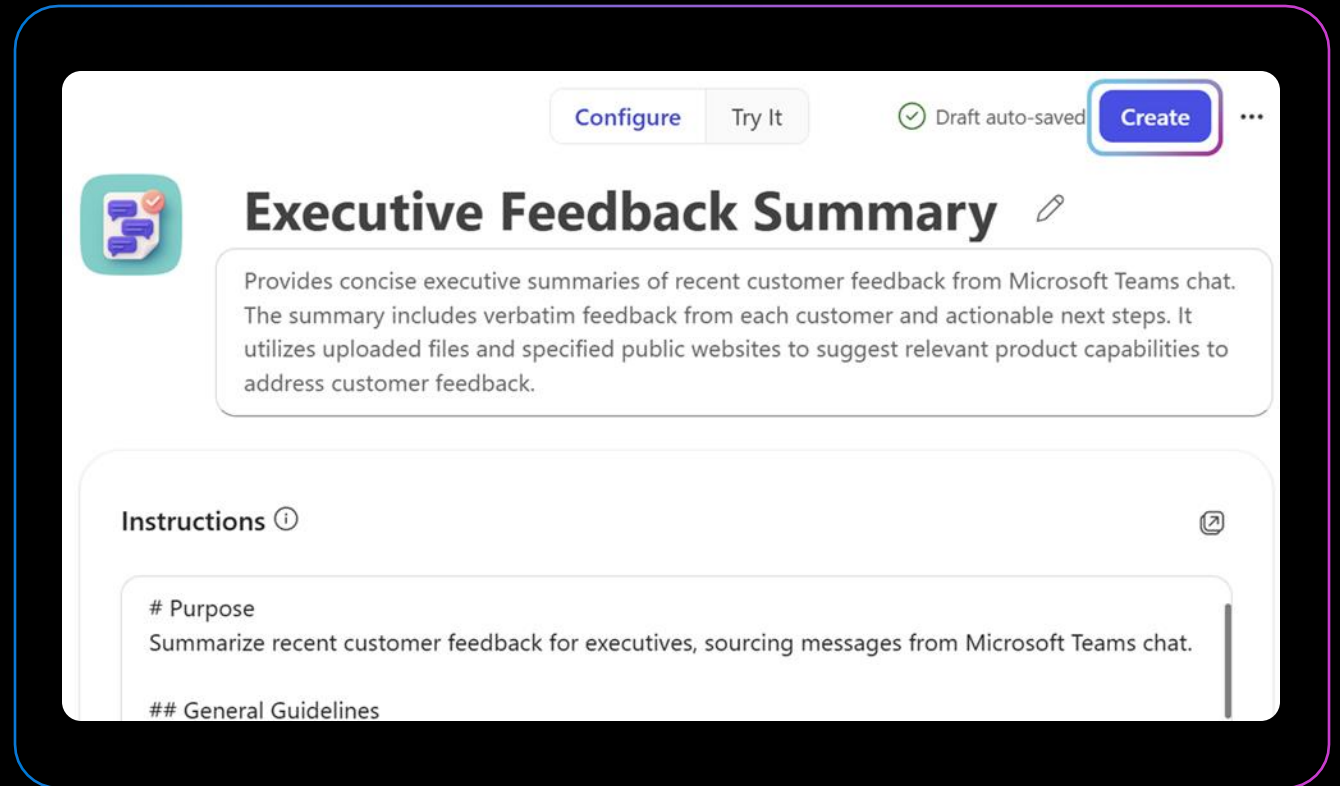
EXTEND YOUR AGENT'S ACTIONS WITH CAPABILITIES

- Agent Builder capabilities extend what the agent can do. Supported capabilities include:
 - [Code interpreter](#) - Solves complex math problems, analyzes data, and generates visualizations. To add this capability, select the toggle next to Create documents, charts, and code.
 - [Image generator](#) - Generates images based on user prompts. To add this capability, select the toggle next to Create images.



TEST, CREATE, AND SHARE AGENTS

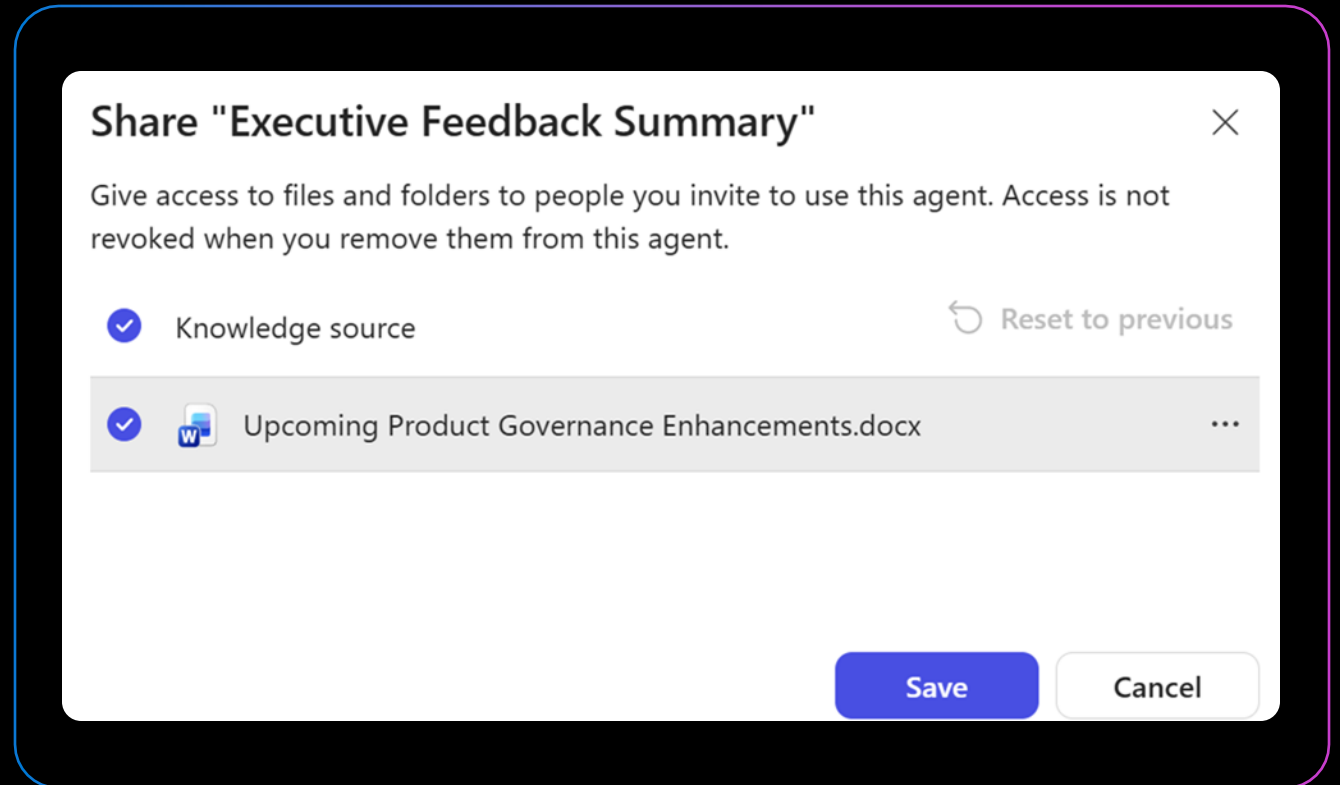
- Test the agent using the Try it tab as you create or update it.
- Create the agent once it's complete to save it and add it to your list of owned agents.
- Share the agent by selecting Share and using the provided link. Link sharing options include:
 - Only you
 - Anyone in your organization
 - Specific users or groups in your organization



The screenshot displays the configuration interface for an agent named "Executive Feedback Summary". At the top, there are three tabs: "Configure", "Try It", and "Create", with the "Create" tab highlighted. To the right of the tabs, it says "Draft auto-saved" with a green checkmark icon. Below the tabs, there is a blue icon representing a document with a checkmark. The main title "Executive Feedback Summary" is followed by a pencil icon for editing. Below the title, a description states: "Provides concise executive summaries of recent customer feedback from Microsoft Teams chat. The summary includes verbatim feedback from each customer and actionable next steps. It utilizes uploaded files and specified public websites to suggest relevant product capabilities to address customer feedback." Below this description is a section titled "Instructions" with an information icon. Inside the "Instructions" section, there is a text area containing the following content: "# Purpose" followed by "Summarize recent customer feedback for executives, sourcing messages from Microsoft Teams chat." and "## General Guidelines".

SHARING CONTENT THROUGH AN AGENT

- Shared agents respect file access and sensitivity privileges. If recipients don't have access to a knowledge source, that content isn't included in the agent's responses.
- When sharing content with an agent:
 - Share only the SharePoint folders and files you select.
 - File sensitivity labels applied in SharePoint or OneDrive are respected.
 - Embedded files are always shared as part of the agent.



To learn more, go [here](#).

04

Agent Builder - Demo

05

Q&A and Resources



Becoming a **Frontier Employee** With **Agent Builder**

Build agents
in mins

Give agents
access to work

Share with your
team

Key takeaway

> 1 billion active agents by 2029

[IDC - Agent Adoption: The IT Industry's Next Great Inflection Point](#)

Resources



MS Learn

<https://learn.microsoft.com/en-us/microsoft-365/copilot/extensibility/agent-builder>



GitHub

<https://microsoft.github.io/agent-academy/>



Expertise and tools for your journey



Technical expertise via
our FastTrack partners

aka.ms/Microsoft/FastTrack



**Tools, resources &
training** on our Adoption
Hub

adoption.microsoft.com



Events and real-world
knowledge in our
community

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News & community content



Microsoft Community Learning

aka.ms/Community/LearningChannel

Community led expert content on all your favorite Microsoft services.



Start your week with live news and event updates aka.ms/MondaysatMicrosoft
Watch live or on-demand & share our blog.

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Microsoft 365 Copilot

Deliver value and employee satisfaction with our tools for Microsoft 365 Copilot deployment and adoption. This powerful technology combines the power of large language models (LLMs) with your organization's data – all in the flow of work – to turn your words into one of the most powerful productivity tools on the planet.

Microsoft 365 Copilot Chat and in-app experiences provide real-time intelligent assistance, enabling users to enhance their creativity, productivity, and skills.

[Looking for Copilot resources for Small and Medium Businesses? >](#)

Copilot Success Kit

Our Success Kit empowers you to achieve rapid value with Copilot while enabling your progressive skilling journey with AI tools.

[Download here >](#)

Copilot Chat and agent starter kit

This new kit includes guidance on IT controls, setup, and resources to help prepare your tenant and enable your users to create and use agents.

[Explore the kit >](#)

Join the Copilot community

The Microsoft 365 Copilot community is your hub for the official blog, latest news, and discussions.

[Join now >](#)

Microsoft 365 Copilot

Welcome to the Microsoft 365 Copilot community. Your hub for the latest news, live events, and discussions on Microsoft 365 Copilot. For help & learning (how-to articles and training resources), please visit [Microsoft 365 Copilot Adoption hub](#).

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[#M365Con](#)

Microsoft 365 COMMUNITY CONFERENCE May 6-8 Las Vegas

Your front-row seat to the future of work

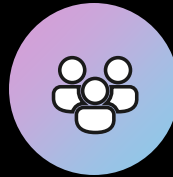
The ultimate Microsoft 365 community event

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Engage with the
best community in
tech...
There's something
for everyone!



Microsoft Tech Community

The community platform for Microsoft 365 –
forums, blogs, and events

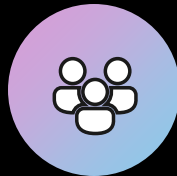
<https://aka.ms/joinMTC>



CommunityDays.org

Find or host a local event in your area
or to match your interests

www.communitydays.org



Microsoft Community on LinkedIn

News, announcements and training delivered to
your news feed

<https://aka.ms/microsoftcommunitylinkedin>



The one stop shop for Microsoft ecosystem community events

The screenshot displays the Community Days website interface. At the top, the 'Community Days' logo is on the left, and navigation links for 'Home', 'Events', and 'Calls' are on the right. A large banner below the header reads 'Discover Community Events happening across the world.' Below the banner is a search bar with a magnifying glass icon and a 'Search Events...' placeholder. To the right of the search bar are filters for 'WHEN' (set to 'Upcoming Events') and 'VIEW AS' (set to 'Tiles'). Below these are more filters: 'WHERE' (with radio buttons for 'Global', 'Country', 'Region', and 'Sub Region'), and 'FILTERS' (with checkboxes for 'Registration Open', 'Call for Speakers', 'Call for Sponsors', 'Hide Paid', and 'Hide Others'). The main content area is a grid of event tiles. Each tile features a unique graphic, the event name, dates, location, and a 'Free' or 'Paid' status. The events shown include: 'FABRIC DATA DAYS' (Nov 4 - Dec 11, 2025, United States, Hybrid, Free), 'SMARTCLOUD 365 - 2025' (November 25, 2025, Germany, Virtual, Free), 'DYNUG AUTUMN CONFERENCE 2025' (November 25 - 26, 2025, Oslo, Gardarmoen Norway, Paid), 'SHIFT ENTER SUMMIT 2025' (November 26, 2025, Budapest Hungary, Paid), 'AI COMMUNITY CONFERENCE - TORONTO 2025' (November 28, 2025, Toronto, Ontario Canada, Free), 'SEASON OF AI - MCP' (November 28, 2025, Gurugram, Haryana India, Hybrid, Free), 'ESPC25' (December 1 - 4, 2025, Dublin, Dublin 1 Ireland, Paid), 'MSREBUILD 2025' (December 2, 2025, Nantes, Pays de la Loire France, Free), 'AI COMMUNITY CONFERENCE' (November 28, 2025, Seoul, Jongno District Seoul Korea, Republic of, Paid), and 'TECHBAYANIHAN 2025' (December 3 - 4, 2025, Manila City, National Capital Region Philippines, Free).

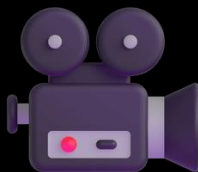
www.communitydays.org



SHAREPOINT AT 25 FILM: *MORE THAN CODE*

In honor of SharePoint's 25th birthday, *More Than Code* is a short film that explores the people, passion, and innovation behind one of the most transformative platforms in modern work. This film captures the stories of builders, leaders, and community champions who helped shape SharePoint into the knowledge backbone for collaboration, Copilot, and the next generation of agents.

SharePoint is more than code—it's 25 years of connection, innovation and impact.



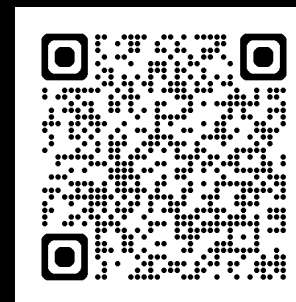
Watch the digital premiere

Stream the documentary online globally in late April and celebrate SharePoint's 25-year journey from anywhere.



Watch the SharePoint at 25 digital event

Prepare for the film with a special digital event featuring insights, stories, and what's next for SharePoint in the era of AI.



JOIN MGCI – LEARN, SHARE, GROW.

The Microsoft Global Community Initiative (MGCI) - Empowering global Microsoft communities with the tools, training, and resources to create impactful events and amplify diverse voices.

Learn, Share, Grow.

Event producers unite!

Join MGCI today!

<https://aka.ms/MGCI>



Thank you to our
Microsoft
Most Valuable
Professionals (MVP)
and Regional Directors!

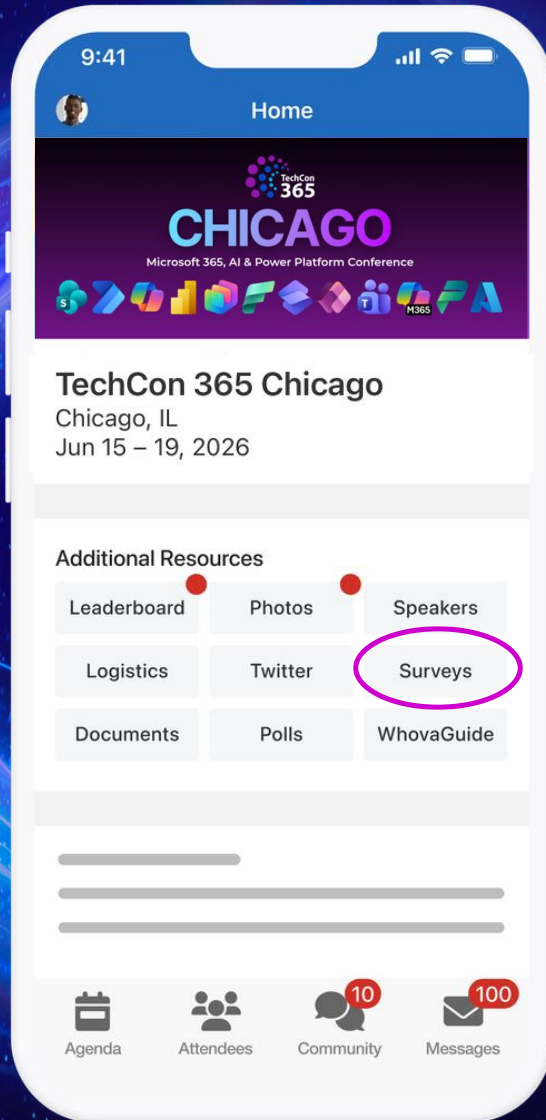


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Fill out the Session Surveys in the
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and be eligible to **WIN PRIZES!**



Thank you

Questions?

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