



Microsoft Copilot Top 20 considerations in using agents

What department leaders need to know about using Copilot agents

As a department head looking to get the most out of Microsoft 365 Copilot, you want to help your people understand the hows and whys of workplace AI. One powerful capability that Copilot provides is the ability to make work faster and easier using Agents.

Agents act as AI apps that can streamline and automate repetitive tasks and processes. Your teams will find it easy to create and implement agents using low-code tools that are available through Microsoft 365 Copilot, Copilot Studio, and Azure OpenAI Foundry.

The following are some important considerations if your department is ready to begin building and using agents:

Before you get started

- **Understand which license you're using**

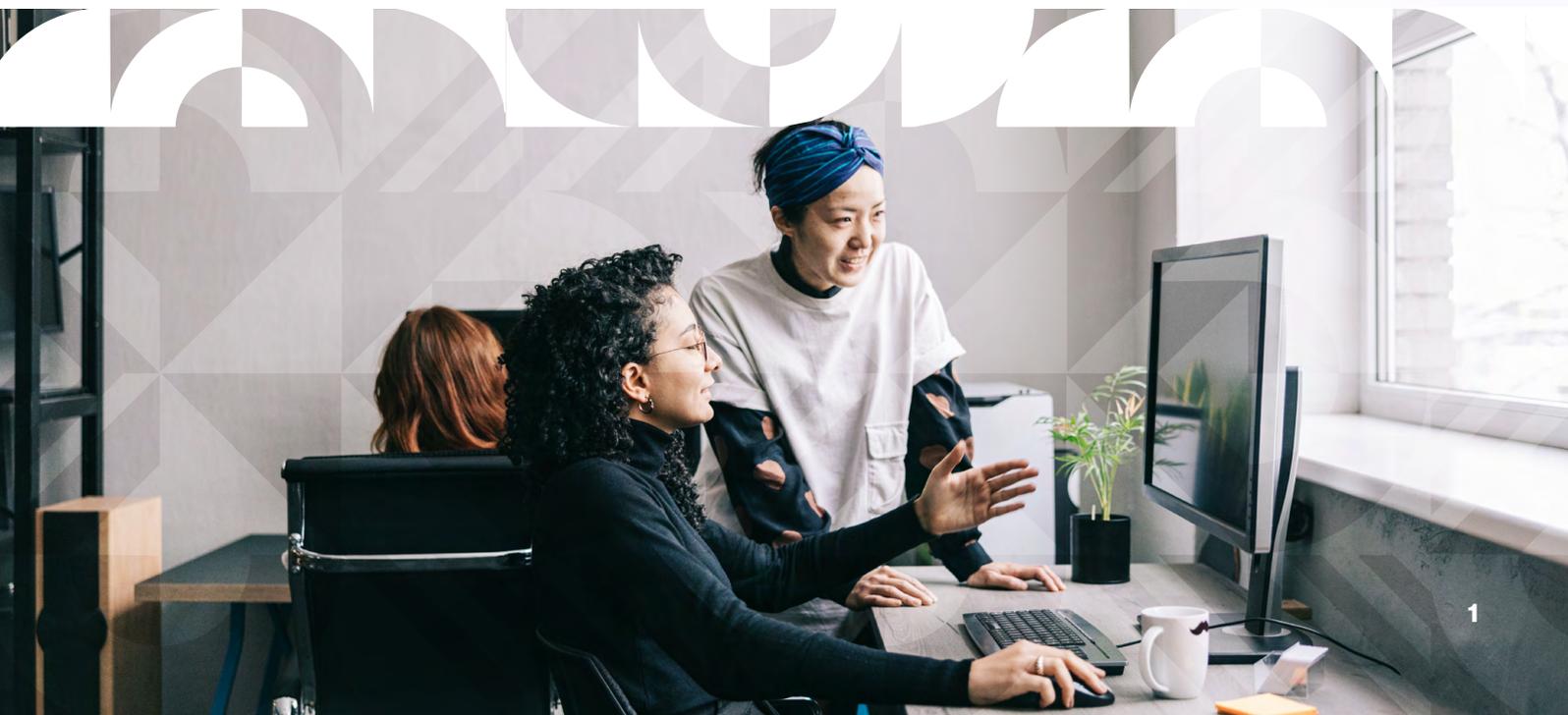
The agents you create on one platform – whether that's Copilot, Copilot Studio, or Azure OpenAI Foundry – remain on that platform. They can't be transferred from one to another. So be sure your employees understand that before they begin building and publishing their own agents for various work tasks.

- **Understand the pay-as-you-go option**

Even if your department doesn't have a full Microsoft 365 Copilot license, your employees can create agents on a pay-as-you-go basis. Creating agents is an option through Copilot Chat, Teams, and other Microsoft 365 applications. When such agents gather data through your company intranet and Microsoft Graph, you'll be charged a small fee for every message that the agent manages to access that data. Agents that point only to data on the internet, however, don't have such charges.

- **Familiarize yourself with security and governance protections**

Copilot Studio provides strong and built-in protections for security and governance, enabling users to configure user authentications, view audit logs and agent activity, check sensitivity levels of data sources, and more.



Building your skills

- **Utilize ready-to-use templates**

Copilot provides many ready-to-use agent templates that you can use as-is or edit for your specific needs. These include templates like Writing Coach, Idea Coach, Prompt Coach, Career Coach, Learning Coach, and Visual Creator. With the natural-language interface, you'll also find it easy to build agents from scratch.

- **Create personal agents or agents to share**

Your people can create agents for personal use or share agents with others, so encourage them to think about ways in which agents can help them with collaborative tasks. When you first create an agent, you are the only one with access to it. You can then change your settings in Copilot to specify access to other users and share a link with them.

- **Specify your languages**

You can specify the primary language that you want an agent to communicate in. Once created, an agent's primary language can't be changed, but you can add secondary languages.

- **Test and update agents**

You can test, improve, and update your agents at any time using [Copilot Studio](#). After testing your agent in the chat panel, you can then save and publish the new version. You can also share and test them with colleagues first before making them available for your entire organization. After testing your agent in the chat panel, you can then save and publish the new version. You can also share and test them with colleagues first before making them available for your entire organization.

Scaling up your capabilities

- **Gain insights through machine learning**

Using machine learning, agents can quickly analyze large volumes of data – such as sales databases, supplier invoices or financial reports – to identify trends, generate granular insights from a subset of datapoints, or predict risks and possible outcomes. You can then direct such agents to act on that information when certain conditions are met. For example, an agent could automatically notify your salespeople when accounts in some regions are affected by regulatory changes that require product or service updates.

- **Understand the various ways to publish agents**

Your organization can publish agents to websites, mobile apps, Microsoft Teams, or other platforms to communicate with employees, suppliers, partners, customers, and others. Unless you specify otherwise, the agent will automatically use Microsoft Entra ID authentication for Microsoft-based applications. You can also choose the “No authentication” option if you want anyone to be able to use the agent.

- **Move on to multi-agent orchestration**

Copilot Studio now supports [multi-agent orchestration](#) that lets you automate tasks across multiple agents. This means you can create a network of agents that work together seamlessly to handle more complex workflows and tasks, enhancing efficiency and productivity in your business operations.

- **Experience the benefits of the Employee Self-Service Agent**

For those with an HR responsibility, consider using Microsoft's [Employee Self-Service Agent](#), which integrates systems that include SAP SuccessFactors, ServiceNow, SharePoint and Workday to provide a single place for employees to find answers to questions about HR policies, time off, benefits and more. Using this, your team can make it easier for people to navigate HR-related information, which improves the workplace experience, saves time and boosts morale.



Exploring possibilities

- **Automate tasks and information retrieval**

Agents can automate everything from simple, rule-based tasks and information retrieval to complex functions that autonomously interact with multiple applications, third-party data sources, and the internet. As people in your department grow more comfortable with using simple agents, encourage them to think about more advanced applications.

- **Monitor systems continuously**

You can create agents that monitor systems continuously and automatically kick into action when certain conditions are reached. For example, you can create an agent that keeps track of weather conditions at your company's warehouses and automatically redirects orders to another facility if one area is experiencing severe storms or flooding.

- **Experiment responsibly**

Your employees can use agents for [a wide range of functions](#): everything from conducting research to creating troubleshooting checklists for customers to analyzing hiring practices for HR to assessing compliance with climate regulations. As they experiment different potential applications, your people should keep in mind company policies on agent creation, data privacy, lifecycle management and more to ensure they are using AI responsibly. That includes understanding the importance of always keeping a human in the loop: any information that's generated by AI should be checked for accuracy and appropriateness.

- **Browse the Agent Store**

One recent addition from Microsoft is the [Agent Store](#), which provides a centralized marketplace of agents built by Microsoft, partners and customers. It's a resource where you can search for Microsoft-curated agents based on your specific business needs and discover personalized recommendations based on your company's user activities. The [cost of using the various agents](#) will depend on the type of license you have, whether you're asking agents for generative AI responses, your use of autonomous triggers and other factors.

- **Find inspiration in other companies' agent success stories**

You can discover use cases from [Microsoft WorkLab](#) showing how organizations across industries and countries are using Microsoft 365 Copilot agents to gain new insights into data, save time, accelerate research, fine-tune product development and more. These stories can be filtered according to several categories: bending the curve on innovation, reshaping business process, reinventing customer engagement and enhancing employee productivity.

Growing your maturity

- **Fine-tune your agents with Copilot Tuning**

Microsoft is beginning to offer [Copilot Tuning](#), which lets you fine-tune AI models for highly specific Copilot agents that are based on your department's unique style or areas of expertise. Work with us to determine your eligibility to utilize this tool.

- **Consider reasoning agents**

Microsoft now offers the option for [reasoning agents](#) built with OpenAI's deep research and reasoning models. These include Researcher for complex, multi-step research tasks, and Analyst for advanced, chain-of-thought analysis of raw data. Reasoning agents are available through the Copilot [Frontier program](#), under the category of Microsoft-authored agents.

- **Use Microsoft Graph Connectors**

Your department can connect data from third parties to Copilot and Copilot Agents by using Microsoft Graph connectors. Microsoft and its partners have built more than 100 connectors that can be found in the [Graph connectors gallery](#), or you can build your own connectors. Microsoft-authored connectors can be accessed for free, while the terms and conditions for connectors from third parties can vary, so always review the details before implementing.

Get started with Microsoft 365 Copilot agents today

Microsoft and SoftwareOne both provide numerous resources to help you get started using agents, including [Microsoft's Agent Success Kit](#) and SoftwareOne's webcast on [How to use Copilot agents](#). If you're looking for further tips and advice or need assistance in testing your first use cases for Copilot Agents, we can provide you with answers and guidance—whether you need support with data integration, security, or compliance, our team is ready to help. Contact us today to get started effortlessly with Microsoft 365 Copilot Agents in your organization.



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