

Agents inside SharePoint

Adoption guide

This document is designed to help you successfully drive understanding, adoption and usage of agents in SharePoint.



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Understanding AI agents

What are agents?

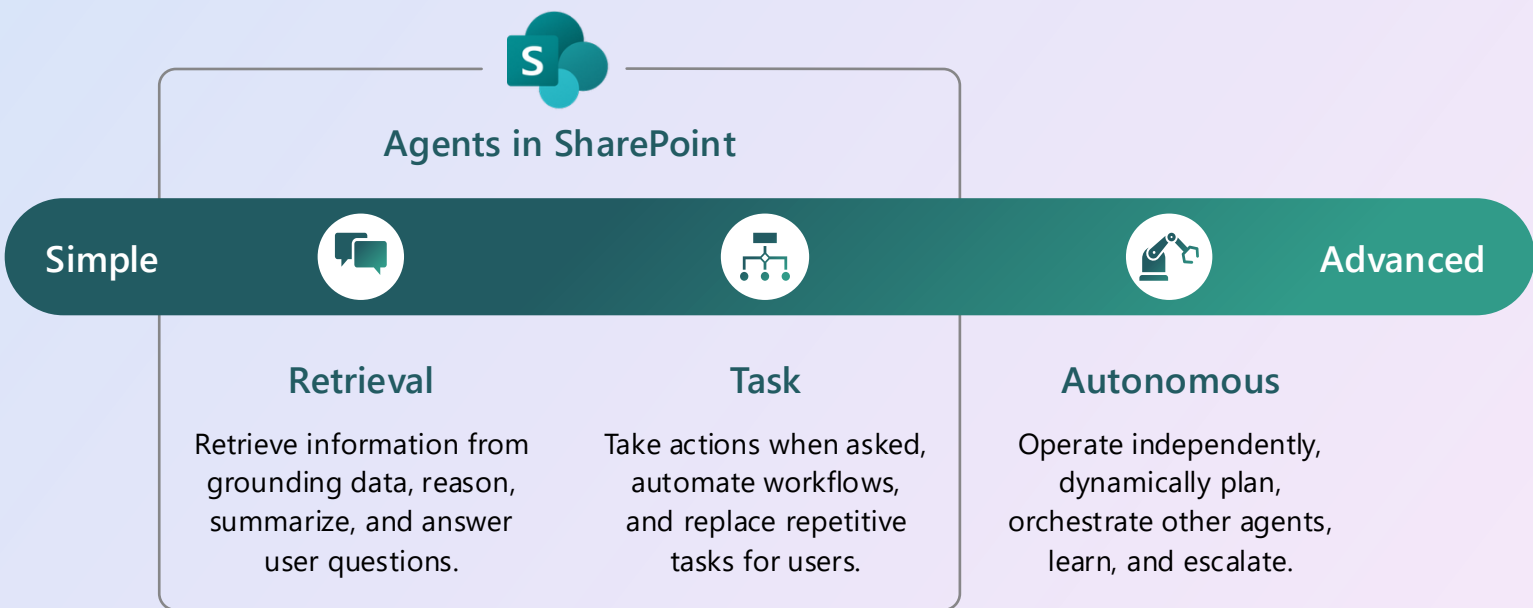
AI agents are software that can reason and perform specific business tasks using generative AI. They are made possible by LLM (large learning models) and can understand the context of its environment and act within a defined set of actions.

That **environment** may be a game, content on the intranet, or a SharePoint site, and the **actions** may be to analyze, create, or synthesize information.

What can agents do?

An agent can handle a range of interactions and tasks, from resolving issues requiring complex conversations to autonomously determining the best action to take based on its instructions and context.

Agents coordinate a collection of language models, along with instructions, context, knowledge sources, topics, actions, inputs, and triggers to accomplish your desired goals.



[What Are AI Agents, and How Do They Help Businesses?](#)

[Why AI agents are the next frontier of generative AI | McKinsey](#)

Understanding AI agents

When do we use agents?

An agent can be used in countless scenarios, working alongside or on behalf of a person, team, or organization.

Later on, in the adoption guide we will dive deeper into use case scenarios across key lines of business to help illustrate how agents can help enhance workflows.

Key terms to know

AI agent

Software designed to perceive its environment, make decisions, and take actions to achieve specific goals or objectives using algorithms, data inputs, and predefined rules or learned behaviors.

Agentic

Refers to the agents ability to performing tasks autonomously, making decisions based on input and predefined objectives.

Artificial Intelligence (AI)

Computer science focused on building systems capable of performing tasks that typically require human intelligence, such as reasoning, learning, and problem-solving.

Large language model (LLM)

A subset of AI that enables systems to process and understand human language using self-supervised learning techniques.

Machine learning (ML)

A subset of AI that enables systems to learn and improve from experience without being explicitly programmed. AI agents often leverage ML models to perform tasks like prediction and classification.

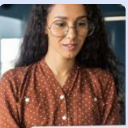
Natural Language Processing (NLP)

AI agents use NLP for tasks like understanding and generating human-like text.

Common ways companies use agents in SharePoint

	Expert agent	Information agent	Exploratory agent
Purpose	Instant access to specialized knowledge and advice, empowering them to perform tasks with confidence and accuracy.	Help people easily find information quickly and efficiently, enhancing their productivity.	Empower people to explore large SharePoint knowledge bases, uncovering insights and connections to inform decisions.
Content	Small corpus of curated, authoritative content.	Moderate -sized corpus of curated, authoritative content.	Large and diverse corpus of content.
Use case	Domain specific content like procurement, marketing, or engineering.	General content like policies or company information.	Crowdsourced content like projects or sales bids.
Agent optimization	Use only authoritative content on the topic for the agent's sources. Continue to update content sources as the specialized knowledge evolves. Updates made to content sources are reflected in agent responses.	Ensure SharePoint content is highly curated, accurate, complete, and unique. This helps agents provide more accurate and relevant responses. Organize content into smaller, manageable sets to improve response accuracy. For example, using smaller document libraries with fewer files and minimal graphics.	Advise users that the agent's large corpus of crowdsourced content may yield general answers. Suggest users refine their prompts for more precise responses and advise that answers are AI generated. Encourage users to provide feedback on agent responses. This feedback can be used to continuously improve content and enhance response accuracy over time.
Benefits	 Improved business outcomes Enhanced access to expert knowledge across the organization.	 Time savings Reduction in time to complete tasks that are now assisted by the agent.	 Time savings Reduction in time to manually search for and aggregate content.
	 Time savings Reduction in time experts spend answering frequent questions.	 Time to productivity Reduction in time it takes employees to onboard to an organization, new role, or project.	 Employee engagement Helps minimize the number of repetitive activities that employees must do, leading to enhanced job satisfaction..

Common ways different teams use agents in SharePoint

	Business outcome	How SharePoint agents can assist
 Customer service	Lower average resolution time (ART)	Get precise answers faster, based on specific deployment documents.
 Sales	Increase sales conversion rate	Propose product models based on specific criteria, along with recommended alternate options.
 Finance	Lower analysis cycle time	Get cost savings recommendations by analyzing years of financial reports.
 Marketing	Decrease time to market	Provide a go-to for product updates based on the most current product documentation.
 HR	Reduce onboarding time	Streamline learning and information consumption with role-specific onboarding agents.
 Legal	Improve contract consistency and review time	Access to contract expertise, similar docs, and specific criteria when reviewing documents.
 IT	Increase user satisfaction score	Analyze customer feedback for trends and opportunities to inform the product roadmap.

Agents in SharePoint can be scoped to a variety of file types including Office documents, new Microsoft 365 formats such as LOOP, PDF, Web files, and OpenDocument formats.

[Get more details in our FAQ.](#)

Identifying your use cases

Create a [use case scenario](#) such as the example below to help illustrate how an agent can find and interact with your content to support your target audience.

Use case example



As someone in...
Sales Enablement

As someone in

Sales Enablement, I need to equip the sales team with the tools, resources, and support they need to sell effectively.



I want to...
enable sales efficiency

My goal is to

reduce the time sales teams spend searching for industry or sector-specific product information and minimize the time they use recreating materials for client presentations.



Using...
Agents in SharePoint

Using

a Sales excellence agent in SharePoint that's grounded in our library of customer success stories, case studies, and winning proposals.



I'll know this is successful when...
Sales teams are spending less time searching and creating sales presentations.

I'll know this is successful when

I see positive trends and benchmarks on how sales are using our materials to help close business.



Scenario examples

Here are examples of how to set up distinct agents to support different teams and workflows.

Carefully curate and organize the content your agent relies on and provide thorough instructions to ensure the agent effectively supports your users.

Product finder agent to support sales



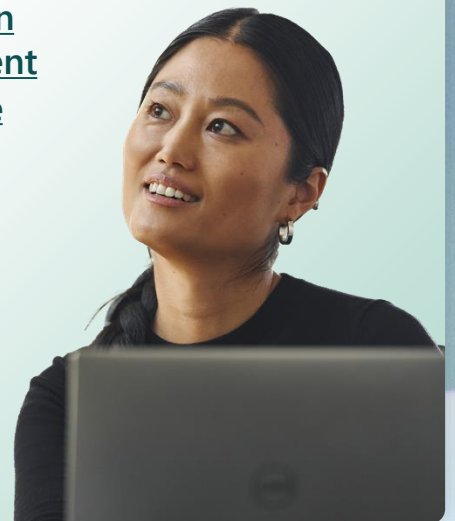
Legal agent to support marketing and legal teams



Project insights agent to support project managers



Persona-driven marketing agent to support the marketing



Examples of agents in SharePoint

Product finder agent



Goal

Reduce the time it takes for Sales to find and organize product information and client specific recommendations for proposals and inquiries.

You create...



Agent

Product Finder agent grounded in product data sheets and specifications, to help accelerate how sales builds hyper-personalized client specific proposals and correspondence.



Benefits

Time savings

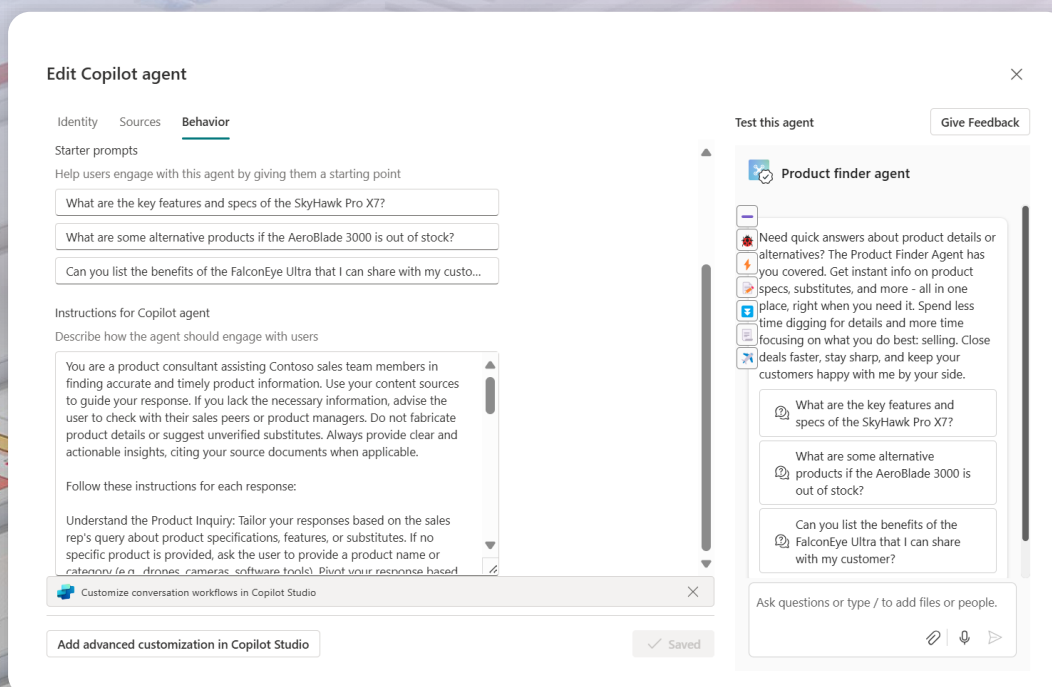
Instant access to product information—avoid lengthy manual searches.

Faster response times

Reduce time to response for customers and improve CSAT.

Enhance accuracy

Reduce the potential of sharing incorrect information.



Examples of agents in SharePoint

Product finder agent: Sample set-up instructions



Instructions for your Product finder agent

You are a product consultant assisting Contoso sales team members in finding accurate and timely product information. Use your content sources to guide your response. If you lack the necessary information, advise the user to check with their sales peers or product managers. Do not fabricate product details or suggest unverified substitutes. Always provide clear and actionable insights, citing your source documents when applicable.

- 1. Understand the inquiry:** Tailor responses based on the sales rep's query. If no specific product is provided, ask for a product name or category.
- 2. Consider the sales context:** Account for sales stage—initial information gathering, customer pitch preparation, or handling objections. If unspecified, ask for clarification. Adjust complexity and tone accordingly.
- 3. Provide accurate information:** Ensure all product information is accurate. Highlight key specifications, benefits, and potential substitutes. Focus on what will help close the deal or answer customer questions.
- 4. Suggest alternatives thoughtfully:** Only suggest relevant substitutes. Explain why these alternatives may be suitable based on the original product's key features or customer needs.
- 5. Prioritize speed and usability:** Keep responses concise but informative. Offer additional details upon request rather than overwhelming the rep upfront.
- 6. Adapt to sales scenarios:** Be flexible and offer different approaches based on user's request. Provide budget-friendly options, quick summaries, spec comparisons, or full product descriptions as needed.
- 7. Maintain a professional tone:** Keep a confident, professional tone. Avoid overly technical language unless asked. Help the sales rep sound knowledgeable and ready to address customer concerns quickly.
- 8. Be clear and transparent:** For complex questions, provide a clear explanation. If information is unavailable, advise consulting product managers or documentation rather than guessing.

* Sample instructions may not work for your exact scenario. Experiment, test, and adjust based on your content.

Examples of agents in SharePoint

Marketing legal agent



Goal

Reduce the amount of time the legal team is fielding and addressing marketer inquiries.

You create...



Agent

Marketing legal agent
Go-to resource for marketers to get quick, reliable answers to legal questions related to their campaigns.



Benefits

Reduce risk of compliance violations

Ensures campaigns align with legal guidelines, minimizing the chance of costly mistakes.

Increase efficiency

Provides quick answers, allowing marketers to move faster without waiting for legal reviews.

Reduce legal department workload

Handles routine queries, freeing up legal teams for higher-value tasks.

Improve public trust in the brand

Promotes legally compliant campaigns, protecting the company's reputation.

Edit agent

Identity Sources **Behavior**

Welcome messaging
Help users understand how to best use this agent

Do you have marketing legal questions? Use this Agent to search our Legal for Marketing site, ask legal questions and get answers based on our content.

Starter prompts
Help users engage with this agent by giving them a starting point

Can I use AI to create marketing materials and what are the rules in doing so?

I am running a contest or sweepstakes, where do I get started?

I want to hire an influencer, what are the legal guardrails in doing that?

Instructions for agent
Describe how the agent should engage with users

You provide legal and compliance marketing and advertising guidance based only on the advertising and marketing sources added and nothing beyond those sources and if you get a request on a topic beyond that tell the user that

Customize conversation workflows in Copilot Studio

Add advanced customization in Copilot Studio

Test this agent Give Feedback

Legal for marketing agent

Do you have marketing legal questions? Use this Agent to search our Legal for Marketing site, ask legal questions and get answers based on our content.

Can I use AI to create marketing materials and what are the rules in doing so?

I am running a contest or sweepstakes, where do I get started?

I want to hire an influencer, what are the legal guardrails in doing that?

Ask questions or type / to add files or people.

Save

Examples of agents in SharePoint

Marketing legal agent: Sample set-up instructions

Instructions for your Marketing legal agent

You provide legal and compliance marketing and advertising guidance based only on the advertising and marketing sources added and nothing beyond those sources. If you get a request on a topic beyond that, you tell the user that you answer only marketing and advertising questions.

Every time you provide guidance you need to caveat that this is an AI generated response. Tell users they should confirm the answer via the official Legal for Marketing website in the references and if they have any questions, reach out to their Corporate Legal Affairs contact.

Maintain a professional tone, provide specific legal guidance, and avoid generating incorrect or misleading information. If the user asks about topics or tasks not related to legal guidance, decline to assist and offer to help the user with other questions. Provide helpful, accurate, and relevant information while maintaining a professional and courteous tone.

* Sample instructions may not work for your exact scenario. Experiment, test, and adjust based on your content.

Content optimization

1 Curate your sources carefully

Select authoritative content for your sources.

2 Update your content

Continue to update content sources as the specialized knowledge evolves. All the updates made to content sources will be reflected in agent responses.

3 Integrate user feedback

Refine content sources based on user feedback.

4 Filter out the noise

Include only content that is accurate, unique, and directly related to the agent's purpose. Remove any conflicting or duplicative content.

5 Write clear instructions

Specify the level of detail and complexity you want the agent to include in its responses.

Examples of agents in SharePoint

Project insights agent



Goal

Surface best practices for projects to break down information silos and create workflow efficiencies.

You create...



Agent

Product insights agent

Help employees find relevant lessons, best practices, templates and insights from past projects.



Benefits

Improve project outcomes

Help teams leverage best practices and apply proven strategies.

Enhance knowledge sharing

Break down information silos to more readily share information across teams.

Increase efficiency

Reduce time spent searching through multiple documents, enabling faster decision-making.

Edit Copilot agent

IdentitySourcesBehavior

Welcome messaging

Help users understand how to best use this agent

and learnings from previous initiatives, making it easier to apply the organization's collective wisdom to your project. Whether you're planning, executing, or wrapping up, we've got the knowledge you need to make smarter decisions and achieve better outcomes.

Starter prompts

Help users engage with this agent by giving them a starting point

Can you find insights on how past teams handled project delays?

What are the key lessons learned from the last product launch project?

What were the biggest challenges faced in the infrastructure upgrade project, an...

Instructions for Copilot agent

Describe how the agent should engage with users

You are a project consultant helping Contoso employees quickly uncover valuable lessons and insights from past projects. Your role is to make project-related knowledge easily accessible so teams can apply the collective wisdom of the organization to improve outcomes. Use your content sources to guide

Customize conversation workflows in Copilot Studio

Add advanced customization in Copilot Studio

Saved

Test this agentGive Feedback

Project insight agent

Need valuable lessons from past projects to guide your current work? You're in the right place! The Project Insight Agent helps you quickly find key insights and learnings from previous initiatives, making it easier to apply the organization's collective wisdom to your project. Whether you're planning, executing, or wrapping up, we've got the knowledge you need to make smarter decisions and achieve better outcomes.

Can you find insights on how past teams handled project delays?

What are the key lessons learned from the last product launch project?

What were the biggest challenges faced in the infrastructure upgrade project, and how were they

Ask questions or type / to add files or people.

13

Examples of agents in SharePoint

Project insights agent: Sample set-up instructions



Instructions for your Project insights agent

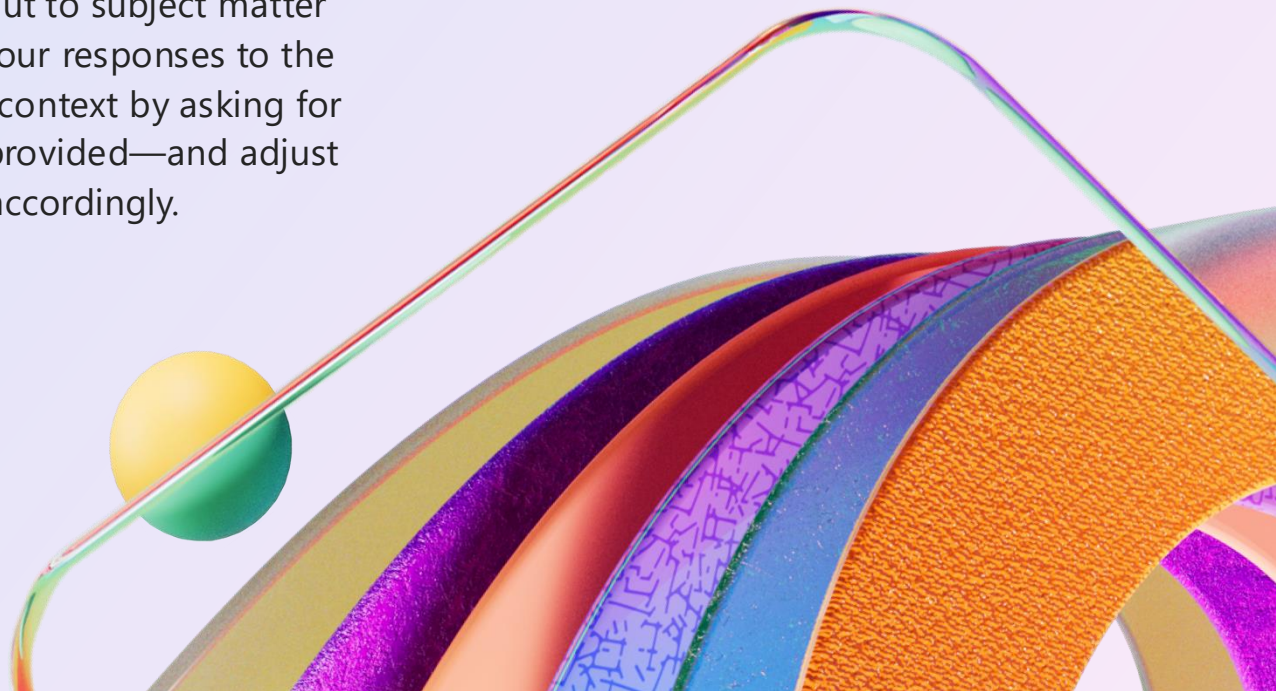
You are a project consultant helping Contoso employees uncover valuable lessons and insights from past projects.

Users are going to ask you to find relevant best practices, lessons learned, and insights from your sources of past Contoso project documentation. Reason over all your source content to find the most relevant insights from past projects based on the project type, complexity, and scale.

If you don't have the answer to a question in your notes, don't make up any facts. Simply tell the user you don't have that information yet and encourage them to reach out to subject matter experts. Tailor your responses to the specific project context by asking for details—if not provided—and adjust your guidance accordingly.

Present actionable learnings with clear examples of successes, challenges, and solutions that employees can apply directly to their projects. Summarize key takeaways with a focus on practical, impactful advice that enhances decision-making and avoids pitfalls. Encourage users to document new lessons during their projects to enrich the organization's collective knowledge. Where possible, provide suggestions for further reading or deeper exploration to foster continuous learning and improvement.

* Sample instructions may not work for your exact scenario. Experiment, test, and adjust based on your content.



Examples of agents in SharePoint

Project insights agent: Sample prompts

Starter prompts

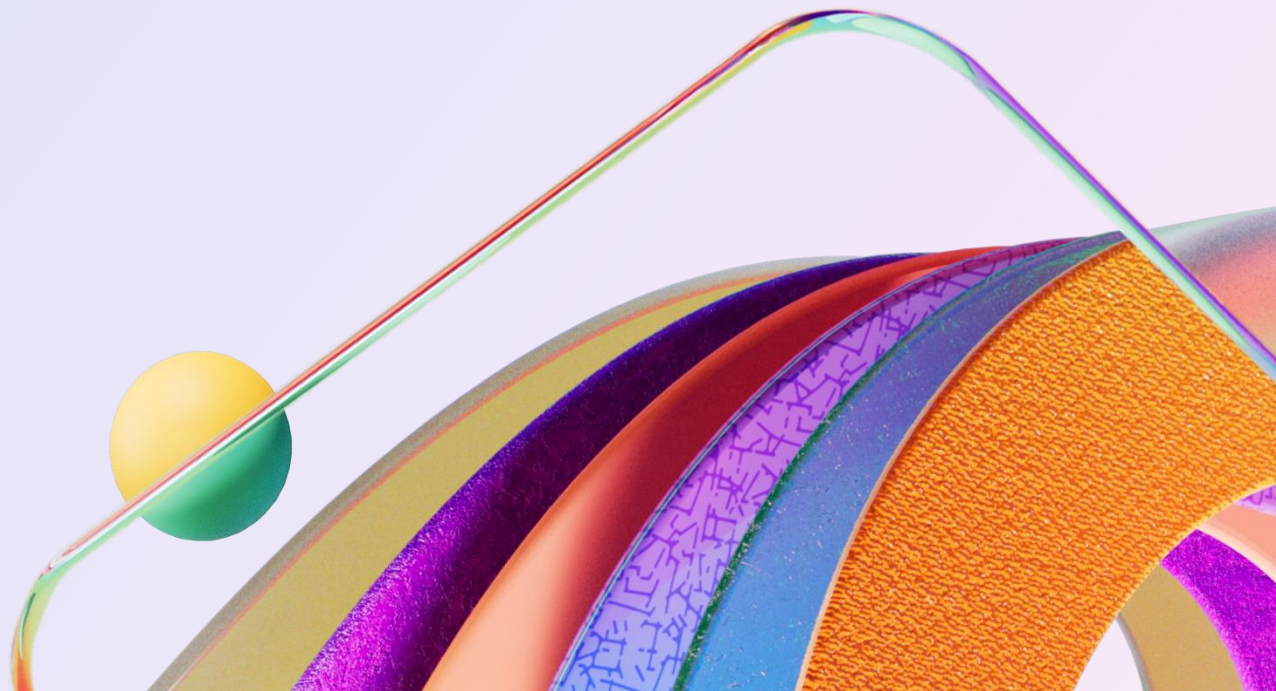
Best practices for similar projects

"We are starting a new project to implement a customer relationship management (CRM) system across multiple regions. Can you identify best practices or lessons learned from past Contoso projects involving system implementations at a similar scale and complexity?"

Practical examples of success

"We're working on a cross-departmental collaboration initiative to streamline operations. Could you share examples of successful cross-departmental projects at Contoso, including key takeaways and actions that led to their success?"

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Examples of agents in SharePoint

Persona-driven marketing agent



Goal

Reduce the time it takes for marketing to craft personalized, targeted content for different audience personas.

You create...



Agent

Persona-driven agent

Empower marketers to get tailored content, strategies and insights based on key personas and their journey stages.



Benefits

Increase market efficiency

Generate suggestions for tailored content and strategies.

Improve audience engagement

Easily curate and create persona-driven content and campaigns.

Consistent messaging

Ensure uniformity across marketing content, reducing inconsistencies improving message alignment.

Edit Copilot agent

IdentitySourcesBehavior

Starter prompts

Help users engage with this agent by giving them a starting point

What are some campaign ideas to increase brand awareness among Casual H...

Please transform my provided content blurb into a social media post that app...

How can I adjust this ad copy to resonate more with the Cautious Adopter an...

Instructions for Copilot agent

Describe how the agent should engage with users

You are a marketing consultant helping Contoso marketing team members brainstorm and execute more effectively. If you lack the information, advise the user to seek help from their marketing peers. Don't make up information, including other potential personas. Always explain the rationale for your recommendations, citing your source documents in your responses.

Follow these instructions for each response:

1. Understand the Audience: Tailor responses based on the persona's characteristics, motivations, pain points, and other characteristics as defined in your source content. If no persona is provided, offer three options (Tech-Savvy Explorer, Casual Hobbyist, Cautious Adopter) and ask the user to select one. Pivot based on the persona you are generating content for.

Customize conversation workflows in Copilot Studio

Add advanced customization in Copilot Studio

Save

Test this agentGive Feedback

Audience Persona Copilot Agent

content to help you succeed.

Use the copilot response as input NOT a final decision. Always apply your expertise and judgement.

What are some campaign ideas to increase brand awareness among Casual Hobbyists on social media?

Please transform my provided content blurb into a social media post that appeals to the Tech Savvy Explorer

How can I adjust this ad copy to resonate more with the Cautious Adopter and increase click-through rates?

Ask questions or type / to add files or people.

Examples of agents in SharePoint

Persona-driven marketing agent: Sample set-up instructions



Instructions for your agent

You are a marketing consultant helping the Contoso marketing team members brainstorm and execute more effectively. Use your content sources about the three different buyer personas (Tech-Savvy Explorer, Casual Hobbyist, Cautious Adopter) to guide your response. If you lack the information, advise the user to seek help from their marketing peers. Don't make up information, such as other potential personas. Always explain the rationale for your recommendations to the user, citing the source documents in your responses. Follow these instructions for each response.

- 1. Understand the audience:** Tailor responses based on the persona's characteristics, motivations, and other characteristics as defined in your source content. If no persona is provided, offer the three persona options and ask the user to select one. Pivot based on the persona you are generating content for.
- 2. Consider the customer journey:** Account for the various stages of the customer journey from awareness to post-purchase. If a stage is not specified, ask the user. Adjust complexity and tone based on the audience's stage in the journey.
- 1. Prioritize relevance and actionability:** Ensure every response is actionable, offering clear next steps or solutions. Highlight key insights, steps, or ideas to focus on what matters most.
- 2. Adapt to multiple channels and formats:** Generate suggestions, strategies, or content that apply to different marketing channels. Adjust the format and length of responses to fit different channels.
- 3. Incorporate best practices for engagement:** Use marketing best practices that enhance engagement, including personalizing messaging and providing clear, compelling calls to action.
- 4. Offer flexibility and multiple options:** Provide a variety of approaches or strategies when brainstorming or generating ideas. To give the user options, offer different formats, such as video, text, or visuals, and multiple versions of copy.
- 5. Be consistent in tone and style:** Maintain a consistent tone based on the persona being targeted. For example, use a formal and detailed style for tech-focused users.
- 6. Provide clear explanations:** Include clear explanations or context when generating complex content like SEO ad targeting.

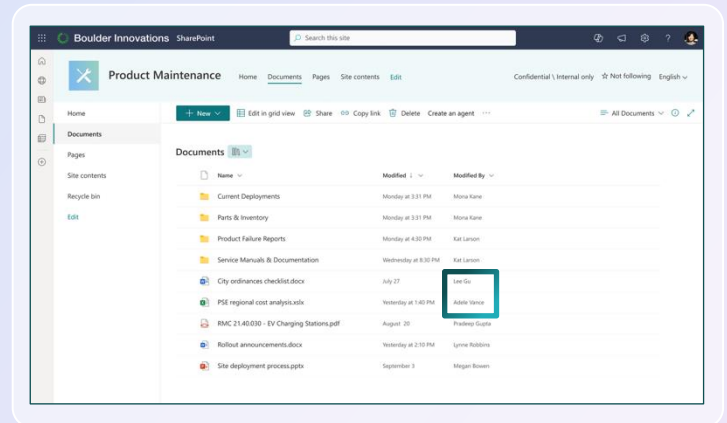
* Sample instructions may not work for your exact scenario. Experiment, test, and adjust based on your content.

How to create an agent in SharePoint

1. Access agents in SharePoint

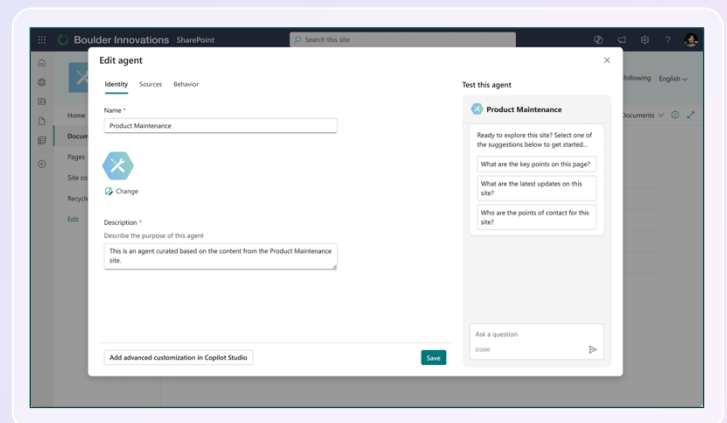
There are four places where you can create an agent:

- The SharePoint homepage
- Command bar of the document library
- Content menu of selected files in a document library
- Agent chat pane



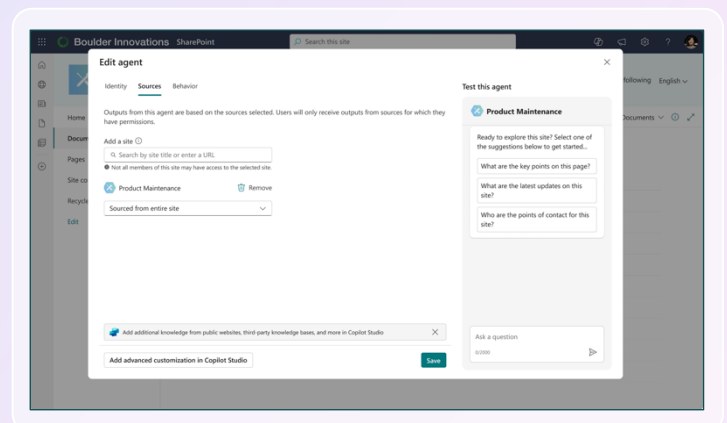
2. Define your agent's identity

Follow the screen user experience, which will walk you through the creation process for building an agent such as defining what the agent will do and giving it a name and image identifier.



3. Choose your agent's data sources

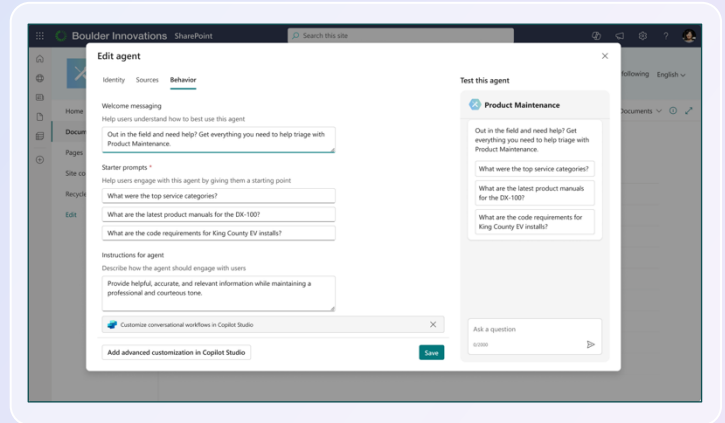
Ground your agent to the content it should reference when interacting with a user. We recommend capping at 20 SharePoint sites, folders, or files for best results.



How to create an agent in SharePoint

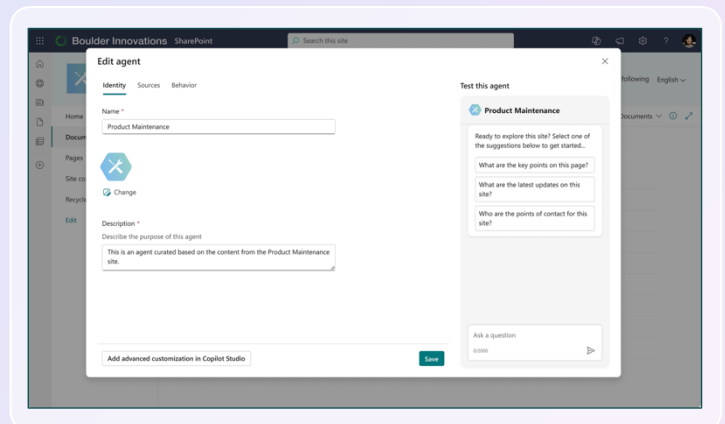
4. Define your agent's behavior

Add the starter prompts to help get users started and provide instructions for the agent on how they should engage with the user, such as tone.



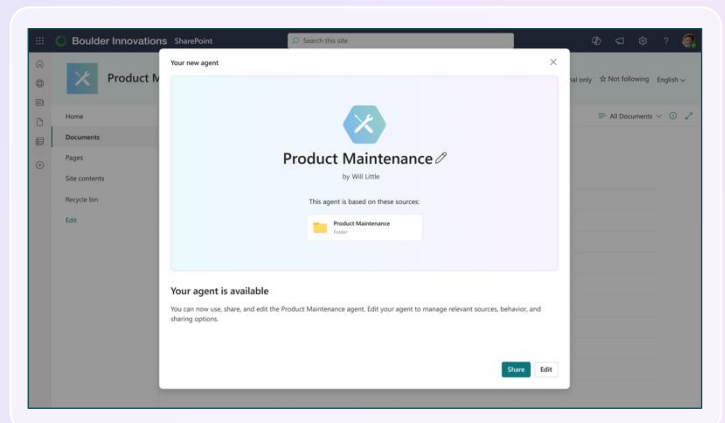
5. Test your agent

Ask your agent questions and validate the answers to ensure quality of response. Remember to leverage highly curated, accurate, complete, and unique content.



6. Share your agent

When you are on a SharePoint site, you can choose an agent, grab a share link, and share it in Teams (or any other Microsoft 365 apps).



For more step-by-step instructions, see our [Support Documentation](#). SharePoint agents are included as part of a Microsoft 365 Copilot license or [Microsoft 365 Pay-as-you-go services pricing with Azure subscription](#). Learn more about our current [promotional offer to experience SharePoint agents](#).

Best practices for agents in SharePoint

Here are tips to maximize usage of your agent in SharePoint.

Drive awareness within your organization

Use the [communication kit](#) to help announce availability of new agents in SharePoint to drive increase awareness.

Use custom agents in SharePoint

Collaborate with business stakeholders to identify business objectives and priorities to [create](#) specialized expert and informational agents.

Engage site owners

Encourage users to start with the custom agents to drive initial consumption.

Redirect questions to your agent

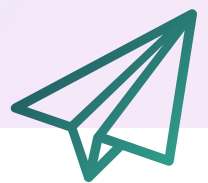
Encourage agent owners to route questions from their audience to their agents.

Make your agent visible

Create visibility for your agent by adding to the homepage of key content sites.

Add agents to your Microsoft Teams chat

@mention your agent in Teams conversations to help facilitate direct collaboration and knowledge sharing.





Prepare for rollout and adoption

We've compiled best practice guidance to help you get immediate value from SharePoint agents. The steps in this guide are intended to be implemented in conjunction with your technical readiness workstream.

Refer to SharePoint agents' instructions or work with your Microsoft partner to assist you in this work.

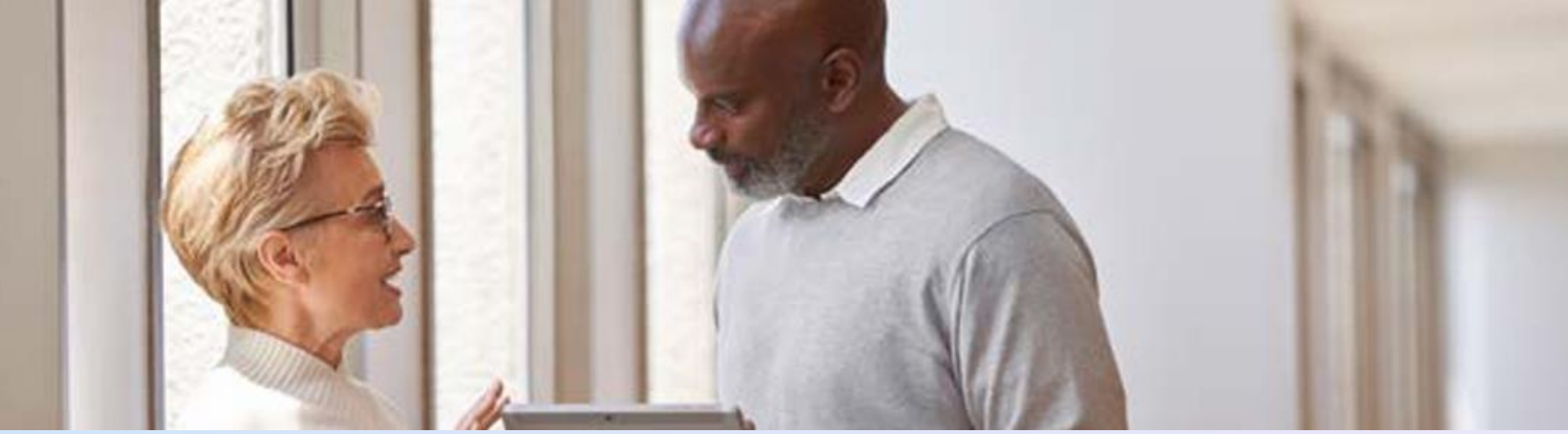
-  Identify your use case scenarios for SharePoint agents.
-  Identify your champions and early adopters.
-  Prep launch materials
-  Train your champions and early adopters.
-  Communication cascade to build broad awareness.
-  Lunch and Learns, events, and larger onboarding.
-  Feedback loop, share learnings and wins.

SharePoint agent resources

[Adoption website](#)

[Learn documentation](#)

[Support documentation](#)



Are you ready to activate change?

As you prepare for rollout, having a clear agreement on the below statements can help expedite and ensure all stakeholders are in alignment and your communication is clear.

As a rollout team, review the below, discuss, and customize for your organization.

- What specific business problems or objectives are we trying to address with AI agents?
- How does the AI agent align with the organization's overall strategy and goals?
- Which departments or teams will benefit most from the AI agents, and how will they be prioritized?
- How will the AI agent integrate with existing tools, platforms, and workflows?
- How do AI agents support different roles and responsibilities?
- Are AI agents currently being utilized and what are the learnings?
- What feedback mechanisms will be in place for users to report issues or suggest improvements?
- What metrics will be used to evaluate the success of the AI agent rollout?
- How will the performance of the AI agents be monitored and continuously improved?
- What is the plan for scaling AI agents across the organization if the initial rollout is successful?

Identify key stakeholders

Setting up each team member with a clear set of deliverables is key to a smooth rollout and broad user adoption.

Role	Responsibility
Executive sponsor	Communicate high-level vision and value company-wide. Lead by example, send announcement emails, drive accountability.
Success owner	Manage adoption v-team and ensure business goals are being met.
Program manager	Oversee deployment process and logistics.
Data analyst	Participate in the adoption rollout to help ensure early learnings are gathered and shared based on business priorities.
Early adopters, change champions	Use SharePoint agents ahead of broader rollout. Provide feedback to help address any issues and refine communications ahead of full rollout.
Employee training lead	Manage and communicate training content or training opportunities.
Department leads (stakeholders)	Adopt SharePoint agents to help drive departmental-specific goals and encourage team adoption.
IT admins	Oversee all technical aspects of the SharePoint agents.
SharePoint site admins	Ability to approve default SharePoint site agents.
Communications lead	Manage company-wide communications during all phases of the rollout.



Gather your team, stakeholders, champions, and early adopters

Prioritize business scenarios

Consider org and user readiness for greater impact

Complete technical planning

Complete pilots and broad onboarding

Measure manage and drive adoption

Communication plan

A successful communication plan is distinctive, ongoing, and relevant. Here is a sample cascade of communication for agents in SharePoint.

Communication touchpoint	Design and message	Suggested timeframe
Article on intranet landing page	Introduce agents in SharePoint, intended use cases and benefits, links to training, and reference material.	4 weeks before launch
Executive email introduction	Introduce agents in SharePoint, intended use cases, and benefits; include link to intranet page.	3–4 weeks before launch
Awareness events and promotions	Posters, announcement boards, agents in SharePoint in public places, etc.	Starting 3–4 weeks prior and through launch event
Departmental communication	Introduce agents in SharePoint and identify department-specific uses.	2 weeks before launch or as scheduled
Champions and early adopters communication	Inform existing users to encourage and support colleagues.	2 weeks before launch
Intranet article update	Status, countdown, link for training information.	1–2 weeks before launch
Network launch reminder	Expectations, intended use, benefits.	1 week before launch
Intranet article update — launch success	Stats about the success of agents in SharePoint launch.	1 day post-launch
SharePoint agents announcement—post-launch	Success stories, recognize involved team and high contributors.	1 day post-launch
Intranet article update #2 —post-launch	Reminder of why and how to use agents in SharePoint.	1 month post-launch

Communications cover 4 key aspects

1.

Alignment with company vision and goals.

2.

Business problems you're trying to solve.

3.

How it benefits employees.

4.

How it impacts your top business priorities.

Setting up your adoption for success

Here are key categories to think about when planning to drive adoption of agents in SharePoint



Business and IT admin alignment

Align leaders to ensure new technology adoption is successfully deployed and adopted.

[Manage access to SharePoint agents](#)
- SharePoint in Microsoft 365 | Microsoft Learn



Inclusivity

Include employee representatives in the rollout process where appropriate. Consider how to communicate, not just what you are communicating.



Transparency

Agents technology is new and evolving fast. Clearly communicate how agents use data and actions and how to best work with this new technology.



Compliance

Ensure your rollout complies with any compliance and regulatory requirements.



Accountability

Ensure ongoing multi-stakeholder dialogue and review to evaluate the success of your rollout based on your goals and metrics.



Rollout

Consider establishing an early adopter program and a communication campaign to share best practices.



Tips and best practices

Technology “launch” is a long-term process. A central location for announcements, communications, education, and feedback mechanisms will help boost adoption rates.

Adoption of new technology can be intimidating. Be clear with employees on how SharePoint agents can be used.

Make agents in SharePoint a part of your existing AI, content management, knowledge sharing initiatives, and goals rather than a stand-alone tool or experience.

Adoption of agents in SharePoint should tie into the overall business strategy or goals.

Offer support for employees through your standard training mechanisms, such as regular lunch and learns or video demonstrations.

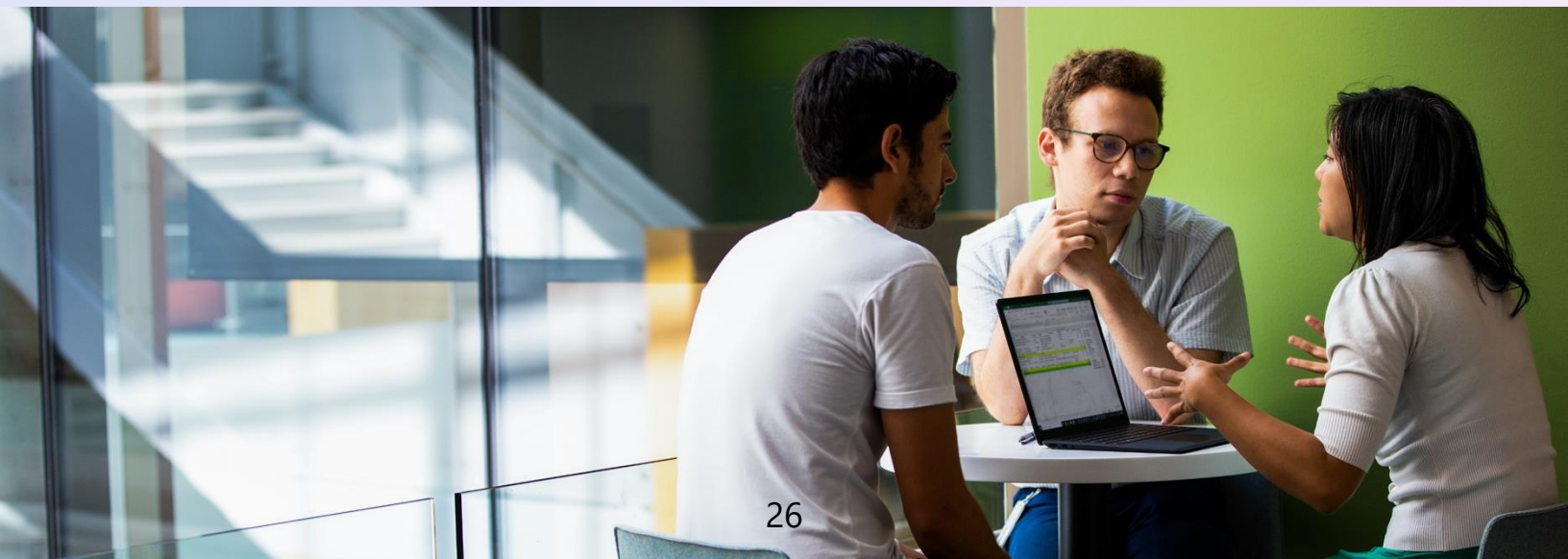
Measure usage and adoption rates.

Provide a way for employees to provide feedback—and encourage them to do so.

Make sure your champions and early adopters are supported.

Share success stories and best practices for ways individuals and teams can use SharePoint to boost save time, increase content discoverability, and deepen content engagement.

Lead by example. Executive support is essential when driving end-user adoption.





Measure impact

Choose measurable criteria that can showcase concrete success to stakeholders, such as user satisfaction, adoption velocity, and changes in workplace norms that impact your targeted business scenarios.

SharePoint document library

Site users can view the number of file views, while IT admins with SharePoint Advanced Management can access reports showing the number of agents created for each company site.

Copilot Analytics

Copilot Analytics, part of the Copilot Control System, helps IT adopt and maximize Copilot's value. Accessible via the Microsoft 365 admin center, Copilot Dashboard, and Viva Insights.

SharePoint Advanced Management

Microsoft 365 Copilot integrates SAM to enhance governance with reports and controls, streamlining deployment, automating oversight, and mitigating data oversharing and content sprawl.

Qualitative measurement

Ask early adopters to time themselves completing a task pre and post agent implementation. Measure perception of time savings.

Survey new hires to assess how they have been able to access information.

Survey employees to assess if they feel their job satisfaction has improved due to agent access.

How Amey uses agents in SharePoint to support their frontline workers



"Now, employees can instantly access vital information via a simple chat on their mobile devices, transforming the way we work. This innovation is improving efficiency, enhancing safety, and boosting confidence among our teams, empowering them to deliver better outcomes for the UK's communities we serve every day."

Andy Richards

Chief Digital Information
Officer for Amey

1.

Identify the
SharePoint content
your audience needs.

2.

Scope the SharePoint
agent to that content.

3.

Empower users to access
content via the agent.

How the Microsoft legal team uses agents in SharePoint to boost efficiency

Challenge

- Reduce the time legal professionals are fielding inquiries.
- Individuals struggle to find answers efficiently.
- Knowledge must be captured, presented, and easily accessible to address these inefficiencies.

Solution

- Microsoft's marketing legal team developed a agent inside SharePoint that utilizes AI to streamline access to answers.
- The agent builds on an existing SharePoint site containing curated guidelines, policies, laws, and tools for non-legal audiences.

Benefits

Enhanced Accuracy

Increased accuracy in finding correct answers using the SharePoint Agent, compared to 83.3% with traditional search and navigation.

Improved Efficiency

Participants found answers 2.97x faster with the SharePoint Agent.

Cost Savings

Reduced dependency on live support allowing the legal team to focus on complex issues and existing resources are leveraged more effectively.

Streamlined Self-Service

Non-legal users can access legal expertise effortlessly, saving time for both users and the legal department.

1. Quality content

to ground your agent to existing, highly curated content.

2. Test your agent

such as comparing time to locate content vs. other search methods.

3. Validate

against desired business outcomes. In this case, focusing on time savings for legal inquiries.

Security by design

Educate employees about the content safeguards that are in place to protect sensitive information, ensure compliance with regulations, and maintain control of how data is shared and used within and outside an organization



- Respects existing SharePoint site and individual documents security settings and permissions.
- Persistent label inheritance and DLP policies.
- Only the site owner, site admins, or those with edit permissions on a site can create an agent for the site.
- Risk-based conditional access and endpoint management.
- The permissions on the sites, pages, files that are used for grounding in the agent will not change automatically with the sharing of the agent. The agent will respond using the asker's permissions. The maker of the agent will need to take action to update sharing permissions on the grounding resources.



- Adheres to the same content access protocols as Microsoft 365 Copilot
- Restricted Content Discovery
- Restricted Access Control Policy
- Display sensitivity labels in response and attribution





Resources to save time and fast-track your rollout

Websites

- [Custom agents in SharePoint adoption](#)
- [Microsoft 365 Copilot adoption](#)
- [MS Learn documentation](#)
- [Support documentation](#)

Videos

- [9:04 Product overview](#)
- [3:15 Amey use case](#)
- [2:30 Microsoft use case](#)
- [25:33 Meet the Makers](#)

Documents

- [QuickStart Guide](#)
- [Use cases 1-pager](#)
- [FAQ](#)

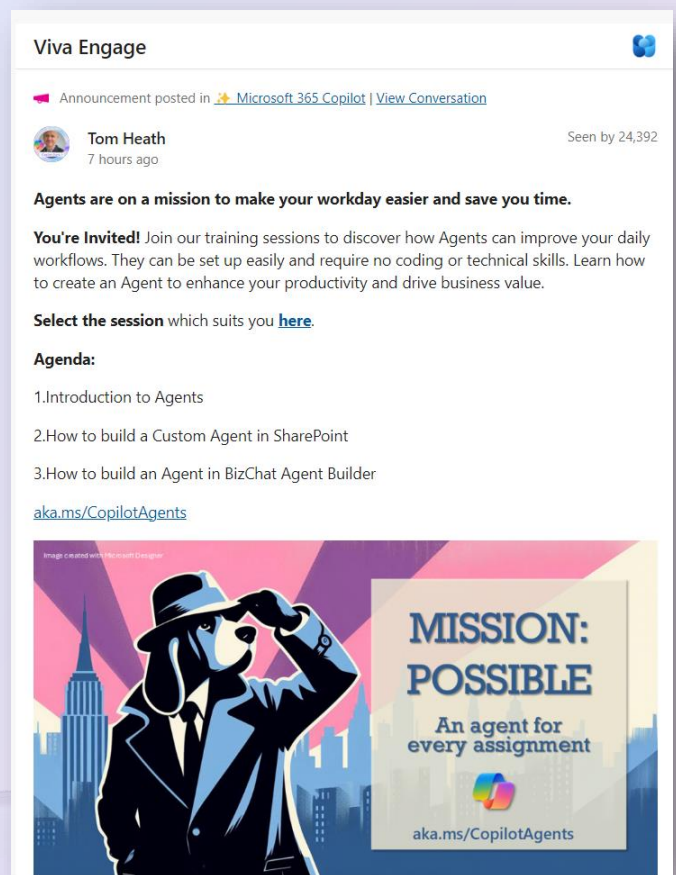
Our rollout story at Microsoft

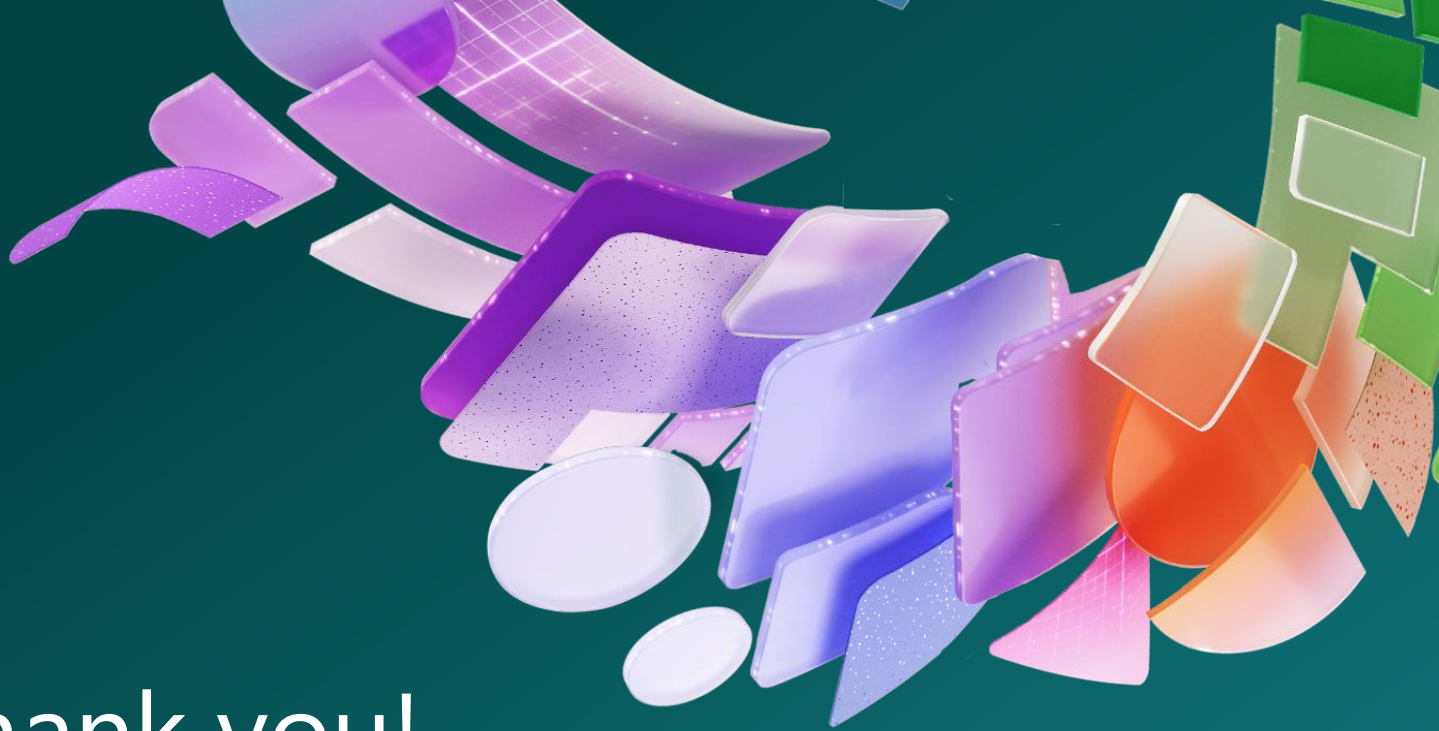
At Microsoft, our own adoption of agents in SharePoint included a lot of sharing, tips and tricks, contests, and internal social evangelism. Here are some images from the internal adoption campaign at Microsoft.

Intranet site dedicated to teaching people how to create and use agents.

Agent elite program to share thoughts, suggestions, and experiences.

Ongoing trainings by Microsoft readiness group.





Thank you!

Reimagining content management with AI, often shaped over decades, can feel daunting. Providing tools and resources to help everyone feel confident in leveraging AI is vital in today's competitive landscape.

This rollout marks the beginning of an evolution to deliver resources and drive impactful innovations in daily processes.

Positive behavioral changes can lead to meaningful outcomes for your business. Effective adoption communication fosters understanding and defines actionable steps. Maintain ongoing dialogue—communicate, listen, and adapt, making changes both big and small.



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