



AI Operational Excellence for HR

Attendance : 16 July

Event name : AI-Powered Operational Excellence (HR)

Locator number : 220024

Part : Day 1

Date : 16/07/2026 08:30 - 16/07/2026 17:00 MYT

Location : PETRONAS LEADERSHIP CENTRE (PLC)



Scan using “Cornerstone
Galaxy” App now



How to Install &
Scan for Attendance
via Cornerstone Galaxy)

Install Cornerstone Galaxy App

- Step 1: App Store / Google Play
- Step 2: Search “Cornerstone Galaxy”
- Step 3: Install
- Step 4: Log in (PORTAL: PETRONAS).

Already have the app? You may skip this part.

Scan Attendance

- Step 1: Open App
- Step 2: Tap QR Scanner
- Step 3: Point camera
- Step 4: Attend recorded

If it doesn't scan; clean camera,
adjust distance or inform facilitator.

Eyes Up, Phones Down

No Texting While Walking



Multitasking isn't always smart. Walking + Phone = **Danger Zone**

Let's practise safe habits, if you see someone using their phone while walking, feel free to *tegur* politely.
Let's remind each other to stay safe.

**Need assistance for
classroom issues?**

Scan here or contact us
via **Whatsapp +6010-4457124**



Concierge Service

Hear from your Leader



DAY 90

Your Value Case — Your Moment to Win!

90 days after the programme (21 October 2026), submit the one value case that proves your Copilot impact — and unlock the rewards and recognition that come with it.

Win a Mystery Gift

The Top 5 strongest verified value cases each win an exclusive mystery gift from PLC.



Get Recognised

Your success story gets showcased to leadership as proof of real, AI-powered impact.



Bank Your Win

Walk away with a documented, manager-verified achievement you for your portfolio.



Only the Top 5 win — make your submission count

Submit your value case and supporting evidence at Day 90. The 5 strongest verified submissions each win a mystery gift from PLC — don't miss your shot.

Programme Schedule

AI Operational Excellence for HR



Morning Session | Foundations & Enablement | 9:00 AM – 12:00 PM

#	Activity	Details
1	Setting the Context	- Context setting by HR Leader - Overview of Microsoft 365 Copilot and agentic AI - Positioning Copilot for HR use cases and business impact
2	Copilot in Action	Real-World HR Scenarios: - Copilot in Word: Drafting, reviewing & refining policies, job descriptions & offer letters - Copilot in Excel: Headcount, attrition & engagement analysis with insights - Copilot Researcher & Analyst Agents: Talent research & workforce due diligence
3	From Copilot to Agents	- Trainer-led demo: Designing and building a basic HR agent - Hands-on labs: Guided agent-building exercises
4	Agent-a-thon Kick-off	- Challenge briefing, rules & success criteria - Team formation, templates & judging guidelines

Lunch Break | 1:00 PM – 2:00 PM

Afternoon Session | Agent-a-thon & Showcase | 2:00 PM – 5:00 PM

#	Activity	Details
5	Agent-a-thon – Ideation & Build	- Group-based brainstorming and solution design - Agent development and solution refinement
6	Submission & Judging	- Submission of completed template to judges - Group presentation and live judging
7	Wrap-Up & Close	- Key learnings & highlights - Winning teams announcement - Programme close



<https://arif.works/petronas/>



ACTIVITY 1



Setting the Context

Understanding Microsoft 365 Copilot — what it is, how it thinks, and how to talk to it effectively.

01

Why AI for HR



Goals and challenges

With changing employee expectations, multi-generational workforces, and hybrid workplaces, it's becoming harder to keep talented people. AI can help to simplify access to data, improve quality and increase creativity, resulting in improvements to essential [Key Performance Indicators](#).



HR roles using AI



Employee Development



HR Compliance



Planning and Business Alignment



Talent Acquisition

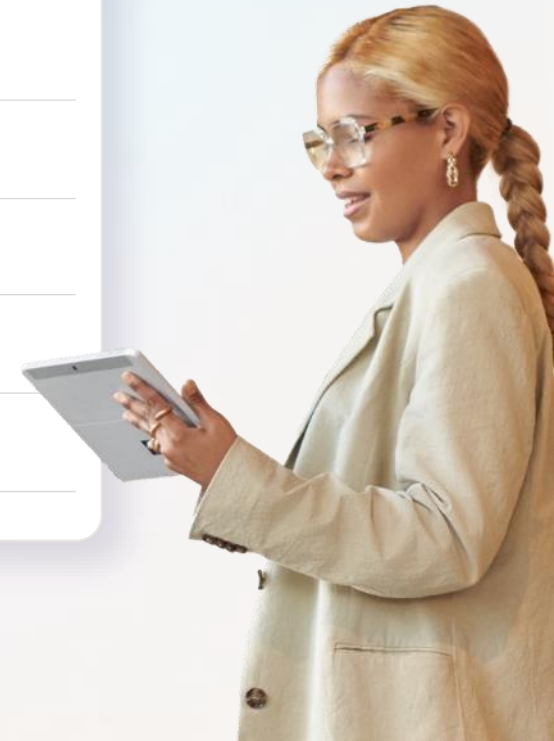


Why AI for HR



Opportunity to impact HR KPIs

Employee onboarding time	Speed time to value of new employees by simplifying access to information and training.
Employee retention	Copilot make work more interesting and reduce overtime requirements to help with retention.
Calls handled by agents	Reduce the number of calls that are made to agents through improved self-service options.
Issue resolution time	AI (Copilot) can help with lowering resolution times which in turn leads to increased productivity and higher employee satisfaction rates.
Cost per hire	Improve hiring and onboarding processes to reduce costs.
Benefit usage	Create improved interfaces for employees to learn about their benefits and improve registration processes.
Employee NPS	Enhance employee Net Promoter Scores (eNPS) by fostering a positive work environment and empowering employees





An **AI assistant** built into the Microsoft 365 apps you already use — grounded in your organization's own data, with permissions you already have.





**Documents
must be
stored in the
cloud**



Copilot is not autopilot

Be specific about what you want and use common language



Your data is secure and private

Uses and shows data when you have access



Check your facts

AI generated contents may be sensitive or hallucinated



Keep, modify, or disregard

Revise and refine your prompt



Who is the **PILOT** ?



Custom Instructions

Consistent style, every time

settings

×

General

Data controls

Personalization

Notifications

Agents

Sources

Personalization

Control how Copilot tailors responses using your preferences. [Learn more.](#)

✓ Custom instructions

Add details about your preferences so Copilot can respond your way.

[Edit instructions](#)

☒

Work profile

Copilot will use your work profile for more relevant answers.

[View work data](#)

✓ Saved memories

Allow Copilot to remember details to provide better responses.

[Manage saved memories](#)

☒

Chat history

Let Copilot use your past chats to personalize responses. [Learn more.](#)

☐



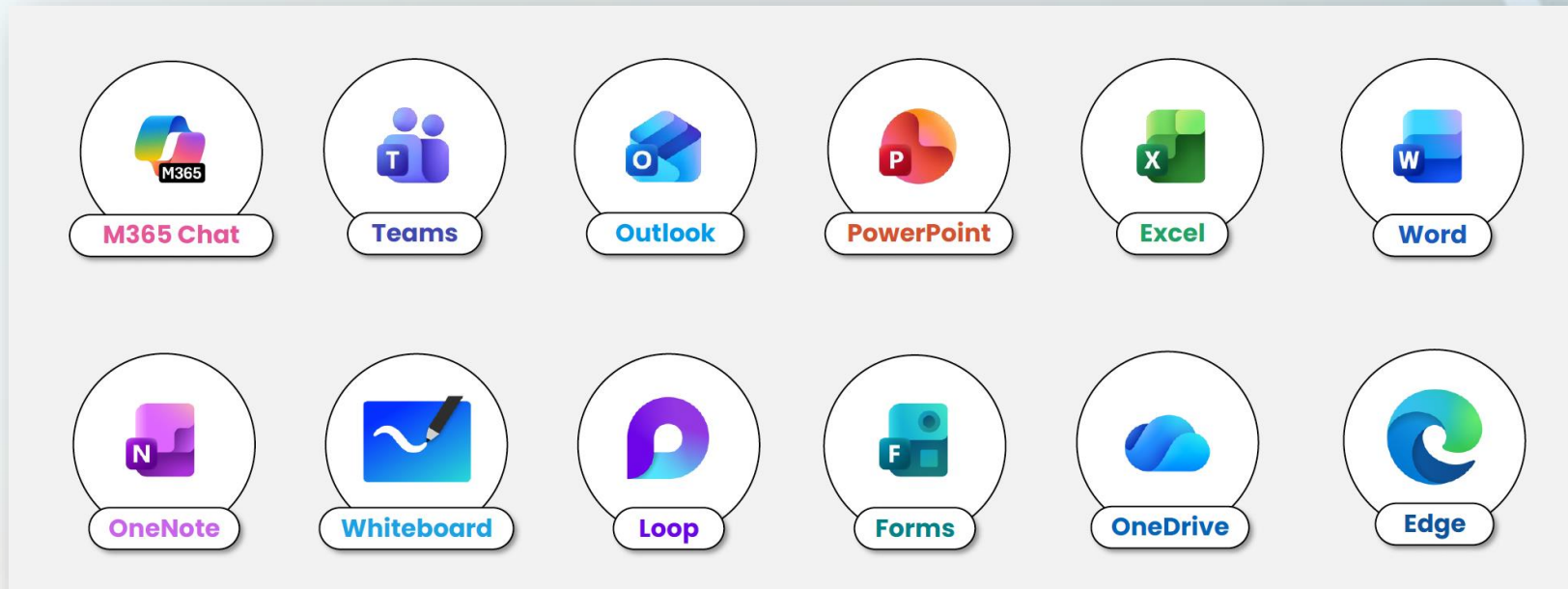
Memory

Saves time & efforts

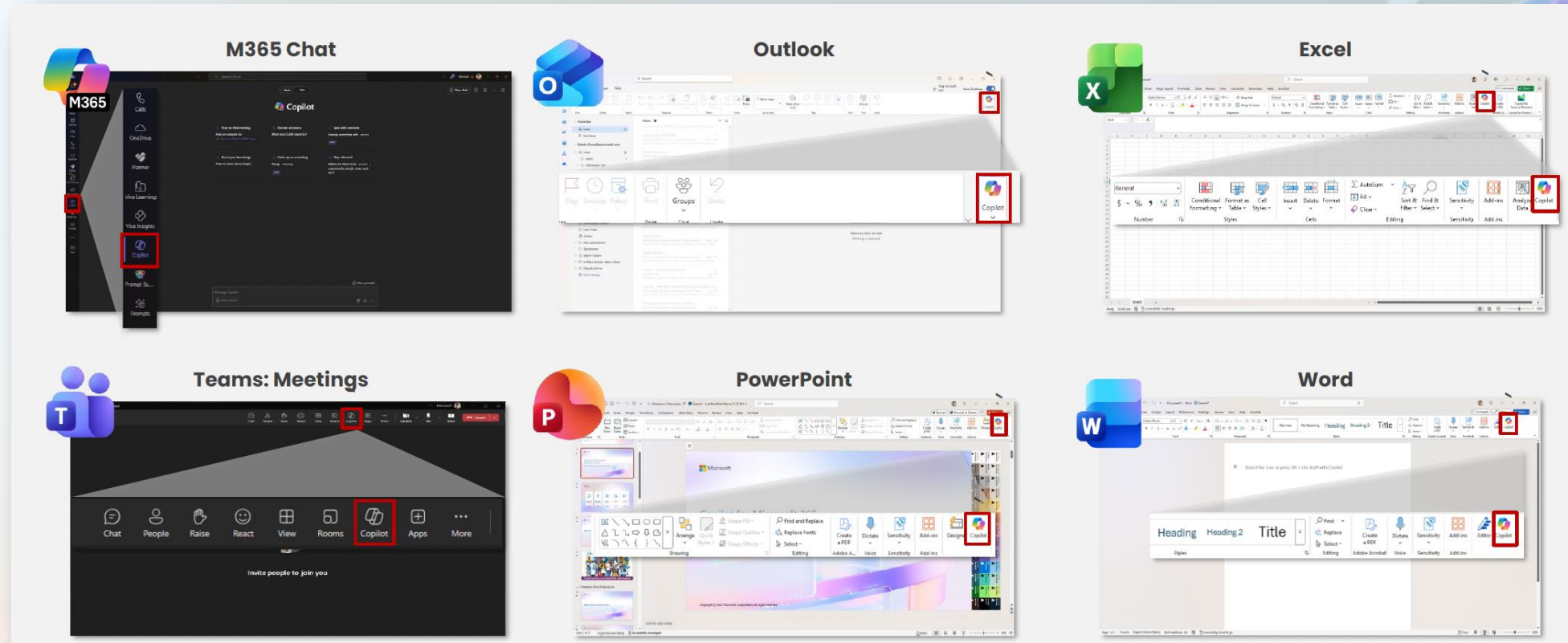
“Remember that when I write HR emails, I always want three bullet points, a clear subject line, and a call to action.”

“Remember that I’m working on Project ORION, and I prefer suggestions to be relevant to that.”

Applications with M365 Copilot



Where to access M365 Copilot?



Secret ingredients of M365 Copilot



Prompt Formula

Context



Why are we doing this?

Goal



What exactly do you want?

Source



What data should Copilot use?

Expectation



How should it look?



An HR Business Partner preparing for a headcount review with the Finance division

I'm an HR Business Partner preparing for a headcount and attrition review meeting with the Finance division leadership (C). Summarize the top three attrition drivers for the Finance department (G) based on the attached Q2 Exit Interview Report (S). Provide a two-sentence overview followed by a structured table showing department, exit count, and top reason for leaving (E).

ACTIVITY 2



Copilot in Action for HR

Applying Copilot to three real HR scenarios: drafting, data analysis, and research.

02

The Retention Risk Briefing



★ Hands on Scenario

Role You are the HR Business Partner for the Upstream Offshore Engineering division.

Trigger Your Division Head has asked for a retention risk briefing on the Offshore Structural Engineering team.

Timing pressure Project Kelisa ramps up in 3 weeks, and this team is critical to it.

The challenge The evidence is scattered: emails, Teams chats, a data sheet, and your own judgement.

Goal



Turn scattered signals into a briefing document, a slide deck, a meeting, and a tracked action plan



The Retention Risk Briefing

STEP 1 OF 7 · COPILOT CHAT



★ Hands on Scenario



Summarize what's been discussed in my recent emails and Teams chats about attrition, resignations, or workload concerns in the Offshore Structural Engineering team, and list who raised each concern.



The Retention Risk Briefing

STEP 2 OF 7 · COPILOT CHAT



★ Hands on Scenario



Agent Mode in Excel

Using the context from /Retention Concerns Summary Page, identify the top three retention risk indicators in this dataset. Highlight employees flagged as critical to Project Kelisa with tenure under 2 years or engagement score below 60. Suggest a chart to visualize risk by role.



The Retention Risk Briefing

STEP 3 OF 7 · COPILOT CHAT



★ Hands on Scenario



Copilot in Word

I'm an HR Business Partner drafting a one-page retention risk briefing for my Division Head ahead of Project Kelisa's ramp-up. Summarize the risks based on /Offshore_Structural_Team_Retention.xlsx and recommend two retention actions. One page, formal tone, executive summary + risk table + recommendations.



The Retention Risk Briefing



STEP 4 OF 7 · COPILOT CHAT

★ Hands on Scenario



PowerPoint Agent

Create a 4-slide presentation from /Retention Risk Briefing.docx for a Division Head meeting: title slide, key retention risks, data snapshot with a chart, and recommended actions. Clean, executive style, minimal text per slide.



The Retention Risk Briefing



STEP 5 OF 7 · COPILOT CHAT

★ Hands on Scenario



Copilot Chat in Outlook

Draft a short email to my Division Head requesting 20 minutes to walk through the attached retention risk briefing for the Offshore Structural Engineering team before Project Kelisa's ramp-up. Concise, flag urgency, suggest two meeting times this week.



The Retention Risk Briefing

STEP 6 OF 7 · COPILOT CHAT



★ Hands on Scenario



Copilot in Teams

Using `/[Retention Risk Briefing meeting] recap`, turn the action items into a to-do list with owners and due dates, and add it to this page.



The Retention Risk Briefing



STEP 7 OF 7 · COPILOT CHAT

★ Hands on Scenario



Copilot in OneNote

Summarize the key decisions and action items from this meeting, and note who owns each action.



A day in the life of an HR Service Manager at Microsoft



Benefits

⌚ ~5 hours per week

🔄 Areas of investment: Continuous learning

★ Get up to speed faster each day

9:00 am – Catch up on email

Josue starts his day by asking Copilot to summarize email he's received in the last 15 hours including any follow up items.



Copilot Chat

Example prompt: Catch me up on my **email from the last 15 hours**. Include any **action items** or **follow up tasks**.

9:30 am – Summarize chats

Josue heads over to Teams and catches up on any communication channels he is part of by using Copilot to recap the Teams groups. This has saved around 1 hour of time and is now productive time.



Copilot in Teams

Example prompt: Recap all my Teams groups messages and **highlight any follow-up tasks**.

10:00 am – Get a case summary

Josue is being contacted by one of his advisors about an escalation case. He asks Copilot to summarize the case so he can understand the reason for the escalation without reading 10+ emails.



Copilot in Outlook
+ Copilot for Service

Example prompt: In Copilot for Service search and open the case and **on Click on summarize the case**.

Josue
is a HR Service
Manager at
Microsoft.



5:00 pm – Get action items

Josue wants to do a final check of any pending task or missed email, so he asks Copilot to summarize any pending action from the last 24 hours or any email where he was mentioned in Outlook.



Copilot Chat

Example prompt: **Summarize all the tasks I've been involved in the last 24hrs**. including emails in Outlook where I was mentioned.

2:00 pm – Create bullet points

Josue is reviewing a new policy/communication that will be launched and asks Copilot in Word to summarize the key points so he can share them during his next team meeting.



Copilot in Word

Example prompt: **Summarize in bullets** from the key points of the documents.

11:00 am – Recap a meeting

Josue records important meetings and asks Copilot to summarize the meetings to help him catch up when he's occasionally late for a call. This allows Josue to completely focus on the call he's on.



Copilot in Teams

Example prompt: **Summarize meeting** depending on the subject, **List the actions points** or **generate follow up questions**.





Copilot Chat can assist with many tasks in the recruiting process from creating job postings and interview questions, to performing research, and assisting with onboarding.

1. Create a job posting

Ask Copilot Chat in Word to create job postings for any role.



Copilot Chat in Word

Prompt: Write a job description for an Accounting Director role with 5+ years of experience.

2. Create interview questions

Brainstorm interview questions specific for any role with Copilot Chat in Word. Create both behavioral and technical questions depending on your needs.



Copilot Chat in Word

Prompt: Generate 5 interview questions for an Executive Assistant with 10+ years of experience.

3. Research salary levels

Find typical salary levels for positions based on geography.



Copilot Chat¹

Prompt: Provide a typical salary range for an Accounting Director role with 5+ years of experience in these five cities.

6. Make introductions

Draft an email to introduce your new employee to their team using Copilot Chat in Outlook.



Copilot Chat in Outlook

Prompt: Draft an email to introduce Jane to her new team based on this information from her resume.

5. Create onboarding materials

Streamline the onboarding process by asking Copilot Chat to generate learning paths according to individual roles, learning styles, and career goals.



Copilot Chat¹

Prompt: Develop a 3-month plan to onboard a new hire.

4. Create an offer letter

Found the perfect candidate? Use Copilot Chat in Word to quickly draft an offer letter for you to send.



Copilot Chat in Word

Prompt: Draft a customizable template for an offer letter.

KPIs impacted

✓ Cost per hire

✓ Reduce onboarding time

Value benefit

✓ Cost savings

✓ Employee experience

Streamline benefits and compensation (Microsoft 365 Copilot)

AI can assist with the research and financial modeling required to update benefits and compensation policies, as well as collaboration and communications to make decisions and inform employees.

KPIs impacted

✓ Increase benefit usage

Value benefit

✓ Employee experience

1. Conduct market research

Prompt Researcher to compile the latest industry trends and data regarding competitive compensation ranges and benefits.



Researcher

Benefit: **Quickly generate tables** of average salaries by market for different roles.

[Get started with Researcher](#)



2. Draft executive summary

Use Word Agent draft a plan in Word for talent planning to share with your executive staff for next fiscal year.



Word Agent

Benefit: **Turn a few thoughts** on the data collected into a detailed planning document.



3. Update financial model

Use Agent Mode in Excel to rapidly update the financial model. Create a financial forecast with advanced analysis capabilities in Copilot.



Agent Mode in Excel

Benefit: **Make rapid updates** to the financial model with Copilot.



6. Communicate changes

Use Copilot in Outlook to draft an email communicating changes to the compensation policy to department managers.



Copilot in Outlook

Benefit: **Draft an email** to a group of department managers that provides detail and timelines regarding employee annual reviews and changes to the overall compensation and benefits.



5. Revise policy document

Use Word Agent to generate a Word document detailing the new compensation strategy.



Word Agent

Benefit: **Turn the bullet points** from the executive presentation into text for the policy document.
[Get started with Word, Excel, and PowerPoint Agents](#)



4. Present updates

Use PowerPoint Agent to generate an executive PowerPoint presentation detailing the new compensation strategy.



PowerPoint Agent

Benefit: **Create a set of slides** from a strategy document in Word to present the strategy and then copy in the Excel charts.



When employee issues arise HR professionals can get assistance from Copilot to understand the issue, research solutions and document solutions.

1. Summarize the challenge

Aggregate a long and complex email thread of conversations to create a holistic and summarized view of the challenge (employee engagement, retention, diversity and inclusion, etc.).



Copilot in Outlook

Action: **Select "Summarize"** to understand key issues and proposed solutions from lengthy email threads related to the HR challenge.

2. Access resources

Ask Copilot to help identify relevant and timely resources to help solve for this common or complex challenge.



Copilot Chat¹

Action: Use Copilot to **rapidly identify relevant and timely** data on how to approach common or complex employee scenarios.

3. Brainstorm ideas

Create a list of questions needed to help solve this challenge.



Copilot in Loop

Action: Prior to a scheduled meeting, have teammates build upon the Loop: **Brainstorm ideas to address the HR situation and challenge.**

6. Communicate to teammates

Communicate plan and actions to appropriate stakeholders and monitor engagement.



Copilot in Outlook

Example prompt: **Draft with Copilot:** An email to stakeholders that provides detail and timelines regarding action plans to address the HR challenge.

5. Update documentation

Update the approach, procedure and/or policy documentation as applicable.



Copilot in Word

Example prompt: Leverage the meeting feedback to update the approach. **Rewrite this section to update the "days to respond"** from 5 business days to 3 business days.

4. Collaborate with teammates

Schedule a meeting to discuss the options.



Copilot in Teams

Action: Use Copilot during the meeting to **"list main ideas we discussed"** and then review the AI notes **"Follow-up tasks"** after the meeting to confirm or update the approach and documentation.

KPIs impacted

✓ Improve eNPS

✓ Employee turnover rate

Value benefit

✓ Cost savings

✓ Employee experience

ACTIVITY 3



From Copilot to Agents

Understanding agents, seeing Agent Builder in action, and exploring HR agent examples for this afternoon's Agent-a-thon.

03

Secret ingredients of M365 Copilot



Prompt Formula

Context



Why are we doing this?

Goal



What exactly do you want?

Source



What data should Copilot use?

Expectation



How should it look?



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What is an Agent?



An Agent

- Purpose-built for one repeatable task or topic – Specialized AI Chat Assistance
- Configured once with instructions and knowledge sources.
- Can be shared so colleagues reuse it without setup.
- Example: an HR Policy Q&A agent trained only on your policies.

Beyond Copilot Chat

Meet the Specialist Agents

Alongside everyday Copilot Chat, Microsoft ships purpose-built agents for deeper research, data analysis, and better prompting — some ready to use immediately, some one click away.



Researcher

Deep, cited research



Analyst

Data analysis



AI Learning Advisor

Learn to build agents



Prompt Coach

Better prompts



WHAT IT IS

A Microsoft-built agent that helps you write, analyze, and improve prompts through an interactive conversation. It coaches you toward a well-structured request using the same context, goal, source, and expectation thinking behind today's CGSE formula.

WHEN TO USE

- A prompt isn't giving you the result you wanted.
- You're new to Copilot and unsure how to phrase a request.
- You want to sanity-check a prompt before running it on sensitive data.
- Teaching a colleague how to prompt well, without writing it for them.

SAMPLE PROMPTS

```
Help me write a prompt to draft a job description in Word using Copilot.
```

```
Here's my prompt: "write a report on attrition." How can I make it more effective?
```



WHAT IT IS

A reasoning agent for deep, multi-step research. Instead of a quick chat reply, it returns a structured, source-cited report — combining a deep-research model with Copilot's ability to search the web and, at work, your own files, emails, meetings, and chats.

WHEN TO USE

- A question has multiple angles and a quick chat answer won't cut it.
- You need citations you can verify and share, not just a summary.
- Preparing for a high-stakes meeting or policy decision.
- Market or benchmark research — it's slower on purpose, built for depth.

SAMPLE PROMPTS

Research current retention strategies for engineering talent in the Malaysian oil & gas sector. Summarize the top three approaches with sources.

Build a briefing on Malaysia's latest employment law changes affecting flexible work arrangements, citing official sources only.



WHAT IT IS

A reasoning agent for data analysis. Attach a file, ask a plain-English question, and it calculates statistics, identifies trends, and spots outliers — like having a data scientist on hand without needing to be one. It can run Python behind the scenes and shows its work.

WHEN TO USE

- Attrition, headcount, or engagement data across multiple files.
- Comparing departments, regions, or time periods.
- Any "what does this data actually tell us" question.
- You want the reasoning shown, not just a final number.

SAMPLE PROMPTS

```
Compare attrition rates by department across these three years of headcount files, and highlight any statistically significant trend.
```

```
Which roles show the strongest correlation between low engagement scores and exits in the last 12 months?
```



WHAT IT IS

A Microsoft-built agent that teaches and troubleshoots Microsoft's AI and low-code stack — Agent Builder, Copilot Studio, and Power Platform. Think of it as a personal tutor for going further with everything covered today, adapting its depth to beginner, maker, or pro-developer level.

WHEN TO USE

- After today's session, when you want to build more advanced HR agents.
- An agent you built isn't behaving as expected and you need to troubleshoot.
- You want a step-by-step guide for a specific Agent Builder feature.
- Deciding which tool fits a scenario — Agent Builder vs. Copilot Studio.

SAMPLE PROMPTS

```
Create a learning plan to take me from beginner to building a multi-step HR agent in Agent Builder.
```

```
My HR Policy Q&A agent isn't answering questions correctly – help me troubleshoot it.
```

Create a custom Agent (using Agent Builder)



The Scenario

You're an HR Business Partner at PETRONAS.
It's festive season — Hari Raya, CNY, year-end — and your inbox is full of the same handful of questions from managers and staff:

- *"Can I accept this hamper from our vendor?"*
- *"Is it okay to attend a supplier's dinner?"*
- *"A colleague did something that might breach the Code — how do I report it without it coming back on me?"*

None of these are really HR policy questions — they're Code of Conduct questions, owned by Ethics & Compliance — but employees default to asking HR because HR is who they know how to reach. Every question means you either dig through the CoBE PDF yourself, or worse, give an answer from memory that might not be quite right.

Create a custom Agent (using Agent Builder)



The Goal

Give every employee a way to get an instant, accurate, cited answer to routine Code of Conduct questions — grounded in the actual CoBE, not guesswork — while making sure anything genuinely serious gets redirected to the Whistleblowing channel instead of being brushed off with an HR staffer's best guess.



Create a custom Agent (using Agent Builder)



Why build it as an agent rather than just telling people to read the CoBE



Nobody reads a 50-page policy document for a one-off question. An agent turns that same document into something people will actually use — the same shift as the CGSE prompting we covered earlier, but packaged so employees don't need to know how to prompt at all. **They just ask.**

ACTIVITY 4



Agent-a-thon Kick-off

04



Agent Hackathon

Group Hackathon Instructions



Let's get hacking!

1. Create a team name and prepare for the competition!
2. **Choose a Use Case:** Brainstorm a real Agents business scenario for your organization.
3. **Describe your Agent:** Leverage the **Prompt Guide** to fill out the hackathon template. Get detailed about your agent and how it would help the organization.
4. **Build an Agent!** Use M365 Copilot (agent builder) or Copilot Studio (!) to create your solution.

Top Tips

1. Watch the clock.
2. This is the art of the possible NOT the art of the impossible. Make sure your agent can be used successfully.
3. Don't overcomplicate it! You might be better with a solution that saves 10 minutes but would be used 20 times per week.
4. Think about how you will present your Agent. You have 5 minutes. Leverage the pack and present an agent prototype or a video about the agent.
5. Practice your pitch!
6. Send your slides across on time! They will be used to create a **Book of Agents** to be sent to everyone after the event.

Agent-a-thon Template





[Business problem]

Problem Statement

Clearly articulate the problem or pain point that your Agent is hoping to solve. Mention how the process is done today & how it could evolve with an agent.

Solution

Provide a description of the envisioned solution, addressing the problem and use case.

Personas

Identify who will directly use the solution – mention department, roles, and number of people it would impact.

Example Use Case

Provide examples of how this scenario would play out in real life to provide context and ground the problem statement.

What potential requests, questions, or tasks may this Agent undertake?

KPIs & Impact

What are the Key KPIs this would impact. How are these KPIs measured today, and are there benchmarks.

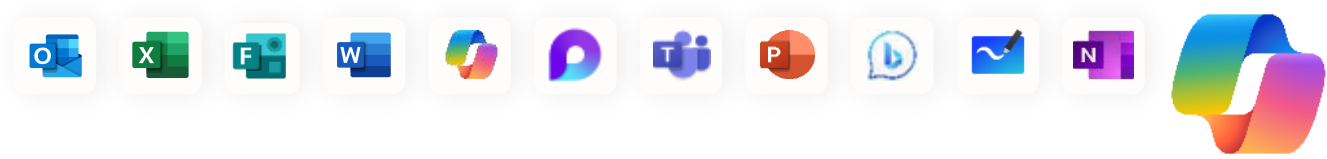
Low/Medium/High impact



Time saving per day/week/month

And for how many people?

Total savings



[Agent Name]

Agent Description: [what the agent would do]

Agent Instructions

Add the instructions that this Agent would need to be given.

Knowledge Sources

Type	Location
SharePoint	
Files	
Websites	
Connections	
3 rd Party Sources	
Other	

The below fields are applicable only to Copilot Studio built Agents, remove if not used.

Triggers

List any triggers used and their purpose

Actions

List and note any actions that the Agent may take for the user

Group Hackathon Template - Completed Example



Business Problem: Delays in Root Cause Analysis with the Customer Service team

Completed Example



Problem Statement

Pain Point 1: Lengthy Issue Diagnosis - Support agents spend excessive time piecing together information to understand customer issues, delaying resolutions.

Pain Point 2: Fragmented Customer Insights - There's no unified summary of themes across emails, meetings, and past tickets, so recurring problems and patterns often go unnoticed.

Pain Point 3: Impact on Customers & Costs - Slow, disjointed support leads to frustrated customers (lower CSAT) and higher operational costs as more staff are needed to handle repeat calls

Solution

Contoso's Customer Service agents grapple with massive volumes of customer emails, tickets, and call notes stored across disparate systems. Our proposed AI-powered support agent (built with Copilot/Agent Studio) serves as a "co-pilot" to the human agent – aggregating multi-channel customer interaction data, summarizing key themes, and highlighting recurring issues in real time. This not only accelerates troubleshooting on individual cases but also creates a feedback loop to upstream product teams and streamlines downstream escalations.

Personas

- 300 Customer service agents in customer support
- 100 Escalation managers 2 support leads in the Advanced Technical Support team
- 500 Product Managers and Engineering Leads in Product Development

Example Use Case

- **Summarize customer interactions across channels** - Quickly generate a unified summary of interactions.
- **Identify recurring issues and suggest resolutions** - Analyze patterns across support cases.
- **Assist with escalations and handoffs** - Automatically create structured summaries for escalated cases.
- **Draft and update knowledge base content** - Propose new knowledge articles based on resolved cases.

KPIs & Impact

- Customer Satisfaction Score (CSAT) – Increase CSAT from 75 % to 80 % within the first quarter.
 - First Contact Resolution (FCR) – Boost first contact resolution rates by ~15%
 - Average Handle Time (AHT) – Reduce average handle time by 30 % (from 10 minutes to 7 minutes).
- High impact**



Time saving per day/week/month

1 hour per day

And for how many people?

300

Total savings

6,600 hours per month

Employee Self Service Agent

Agent Type: Copilot Studio

Completed Example

Agent Instructions

Role: You are Rootly, an AI-powered assistant designed to help Contoso Technologies' customer service agents quickly understand customer issues, identify recurring patterns, and accelerate root cause analysis. You act as a smart co-pilot—summarizing multi-channel customer interactions, surfacing similar past cases, and suggesting relevant knowledge base content.

Tone & Style:

- Professional, clear, and concise.
- Supportive and proactive
- Empathetic when referencing customer frustrations
- Confident when suggesting next steps or resolutions

Core Instructions:

- Always begin by summarizing the customer's issue using available data (emails, tickets, transcripts).
- Highlight any recurring themes or similar past cases that may help resolve the issue.
- Suggest relevant knowledge base articles or troubleshooting steps.
- If the case appears complex or unresolved, prepare a structured summary for escalation.
- Avoid technical jargon unless the user is a technical support agent.
- Prioritize speed, clarity, and relevance in every response.

Knowledge Sources

Type	Location
SharePoint	Knowledge based and FAQs repository
Files	Outlook email and communication logs; Teams call transcript logs
Websites	Product documentation & release notes (external support site)
Connections	HR System, IT Ticketing system
3rd Party Sources	Support ticketing system (ServiceNow) and Customer CRM Profile (Dynamics 365)

The below fields are applicable only to Copilot Studio built Agents, remove if not used.

Triggers

New Ticket Created Trigger: A new support ticket is opened in ServiceNow or Salesforce. Purpose: Automatically generate a summary of past interactions and similar cases.

Agent Requests Summary; Trigger: Agent clicks a "Summarize" button. Purpose: Pull and condense emails, chats, and ticket notes into a digestible overview.

Escalation Flagged; Trigger: Ticket is marked for escalation. Purpose: Generate a structured escalation summary with context and prior steps.

Actions

Summarize Customer Interactions - 1. Pulls data from emails, tickets, chats, and calls. 2. Outputs a natural-language summary with sentiment and timeline.

Suggest Similar Cases - 1. Searches ticketing system for matching issues. 2. Displays resolution steps and outcomes from past cases.

Generate Escalation Summary - 1. Compiles issue description, actions taken, customer impact, and related cases. 2. Formats for engineering or Tier-2 handoff.

Agent-a-thon



Judging Criteria



How are the presentations scored?

A scale of 1-5 for each:



Innovation

How creative and original is the solution?
Does it bring something new to the table?



Impact

How much potential does the solution have to improve the user experience with Microsoft 365 Copilot & Agents?
Does it solve a real problem or address a pain point?



Feasibility

How practical is the solution?
Can it be realistically implemented within the constraints of the Agentathon?



Solution Excellence

How well does the solution make use of the available technology?



Presentation

How well does the team communicate their solution and its benefits?
Is the presentation clear, concise, and engaging?

8 min to present your scenario



Don't Leave Me Behind! 🤔

Take a second look
around before
you go.

*Lost something? Our reception can
assist you at +603 8732 7700.*

Thank you for joining
AI-Powered Operational Excellence (HR)
16 July

We truly appreciate your time in completing the MTM
evaluation survey



Rating Scale

STRONGLY
DISAGREE



1



2



3



4



5

STRONGLY
AGREE

How likely are you to recommend this
learning experience?

- Scale 0-6 – Not recommended
- Scale 7-8 – Neutral
- Scale 9-10 – Recommended