

Create a Monthly Business Review (MBR) Agent

This guide provides step-by-step instructions for creating an MBR (Monthly Business Review) Agent, which is designed to streamline the preparation process for MBRs. By following the guide, users will learn how to query resources and obtain quick answers, ultimately enhancing efficiency and organization for business reviews. It's a valuable tool for anyone looking to optimize their workflow and ensure they are well-prepared for important business discussions.

Lab Details

Level	Persona	Duration	Purpose
100	Maker/Developer	20 minutes	After completing this lab, participants will be able to create a conversational agent hosted in SharePoint. You'll learn how to add knowledge sources, test and publish to SharePoint.

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Why This Matters

Managers and Team Leads – Drowning in slide decks, scattered data, and last-minute scramble sessions before Monthly Business Reviews?

Think of a traditional MBR prep process:

- **Without agents:** Leaders dig through dozens of decks, copy/paste insights, manually summarize risks and themes, and chase down team updates – all while trying to spot patterns across silos
- **With agents:** AI reads files from SharePoint, extracts key themes (like at-risk deals or blockers), and delivers concise summaries you can act on – no digging required

Common challenges solved by this lab: - “We waste hours each month trying to consolidate MBR decks from every team” - “Leadership misses key risks or repetitive asks buried in PowerPoint files” - “It’s hard to spot trends across different teams without a data analyst” - “We’re reactive instead of proactive when it comes to business risks”

In just 20 minutes, you’ll learn how to build an agent that helps leaders get to the “so what” faster—turning static decks into actionable insights.

Introduction

Monthly Business Reviews (MBRs) are critical for keeping leadership informed, identifying risks, and aligning on key initiatives. But the preparation process is often tedious and fragmented, requiring hours of manual effort to gather, review, and summarize insights from multiple teams.

Real-world example: A regional sales org prepares for its MBR by collecting slide decks from over 10 team leads. Each deck includes updates, at-risk deals, and escalations—buried across inconsistent formats and file names. A single director spends 4–6 hours manually scanning each one, summarizing recurring themes, and building a master summary for leadership.

After implementing an agent, the director simply prompts the system to scan the latest MBR files in SharePoint. Within seconds, the agent highlights common risks, summarizes recurring asks, and surfaces trends across teams. Now the director can focus on strategic insights—not file wrangling.

Core Concepts Overview

Concept	Why it matters
Conversational Agent	Powers natural, chat-like interactions so users can ask about MBR themes, risks, and takeaways without needing to dig through files manually
Knowledge	Enables the agent to read and understand content from past MBR decks stored in SharePoint, so it can extract relevant insights and patterns
Testing in Copilot Studio	Helps you validate that the agent understands user intent and returns accurate, useful responses before it's shared with others
Publishing to SharePoint	Makes the agent accessible to your team directly from a SharePoint site, so anyone preparing for an MBR can use it on demand
SharePoint Agent Setup	Seamlessly integrates with your existing file storage so your agent always has access to the latest MBR decks—no need to move files around

Documentation and Additional Training Links

- [Microsoft Copilot Studio Documentation](https://learn.microsoft.com/en-us/microsoft-copilot-studio/) (https://learn.microsoft.com/en-us/microsoft-copilot-studio/)
- [Copilot Studio Triggers and Tools](https://learn.microsoft.com/en-us/microsoft-copilot-studio/advanced-trigger-actions) (https://learn.microsoft.com/en-us/microsoft-copilot-studio/advanced-trigger-actions)

Prerequisites

- Access to Microsoft Copilot Studio with appropriate licensing
 - Microsoft 365 environment with SharePoint access
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Summary of Targets

In this lab, you'll build a conversational MBR agent that streamlines how managers and leaders access insights across Monthly Business Review decks. By the end of the lab, you will:

- Create and configure a conversational agent using Copilot Studio
- Add knowledge sources by linking SharePoint-stored MBR files to the agent
- Test the agent to ensure it can accurately summarize risks, trends, and key themes
- Publish the agent to a SharePoint site so it's easily accessible to stakeholders
- Enable your team to ask questions like "What are the common risks this month?" and get immediate, actionable answers

Use Cases Covered

Step	Use Case	Value added	Effort
1	Create SharePoint site and upload MBR documents	Establish centralized document repository for MBR data that the agent can access	10 min
2	Build and deploy MBR agent	Create intelligent agent that analyzes MBR documents and provides instant insights	10 min

Instructions by Use Case

Use Case #1: Create SharePoint site and upload MBR documents

Set up a dedicated SharePoint site with MBR documents that will serve as the knowledge source for your agent.

Use case	Value added	Estimated effort
Create SharePoint site and upload MBR documents	Establish centralized document repository for MBR data that the agent can access	10 minutes

Summary of tasks

In this section, you'll create a SharePoint team site and upload sample MBR documents that will serve as the knowledge base for your agent.

Scenario: Your organization needs a centralized location for Monthly Business Review documents that can be easily accessed by an AI agent to provide instant insights and summaries.

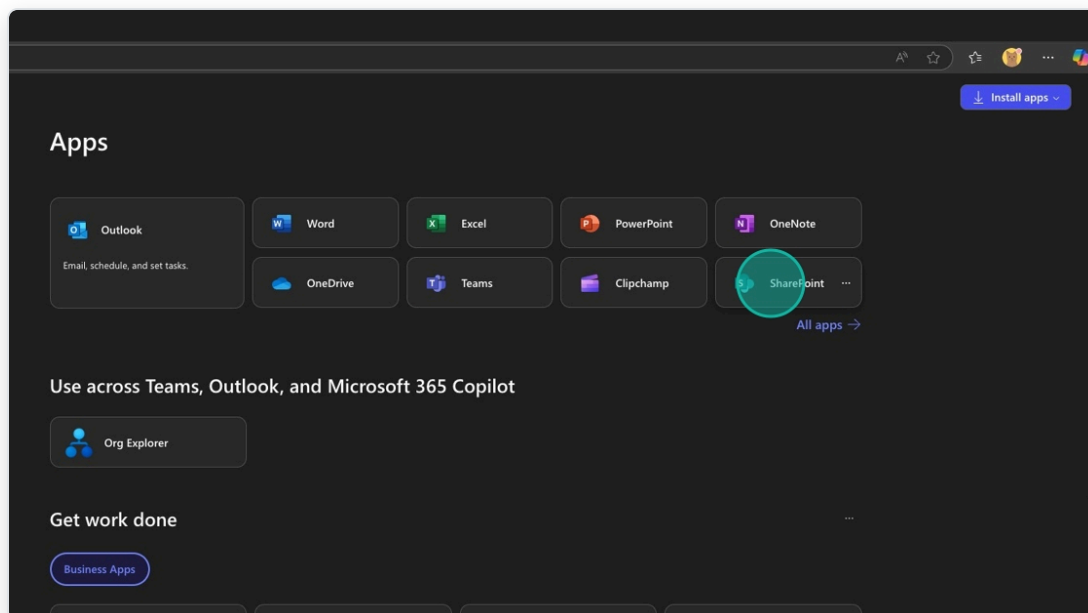
Objective

Create a SharePoint site with MBR documents that will serve as the knowledge source for your conversational agent.

Step-by-step instructions

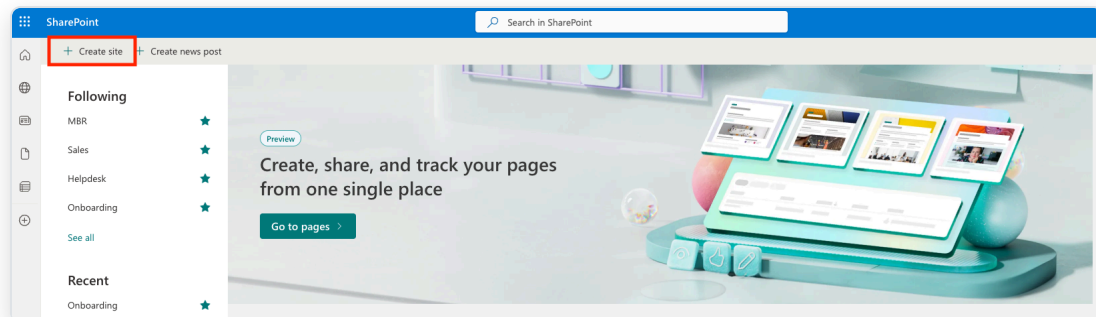
Create SharePoint site

1. Go to m365.cloud.microsoft/apps/ (<https://m365.cloud.microsoft/apps/?from=PortalHome&auth=2>) and select **SharePoint**



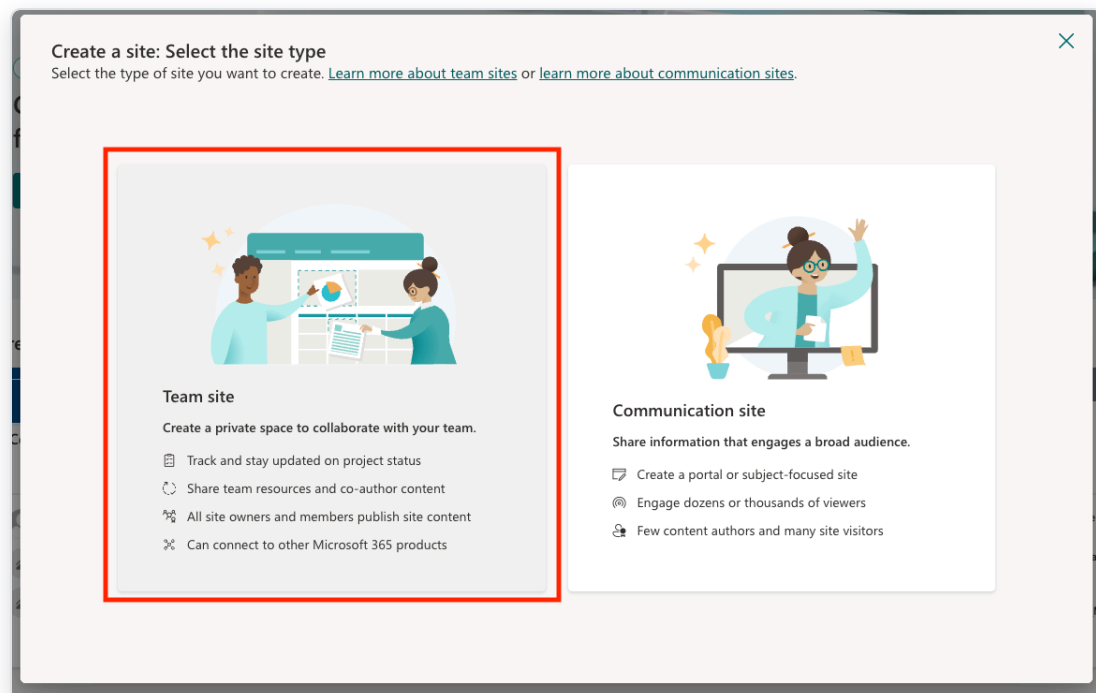
SharePoint

2. Select **Create Site**



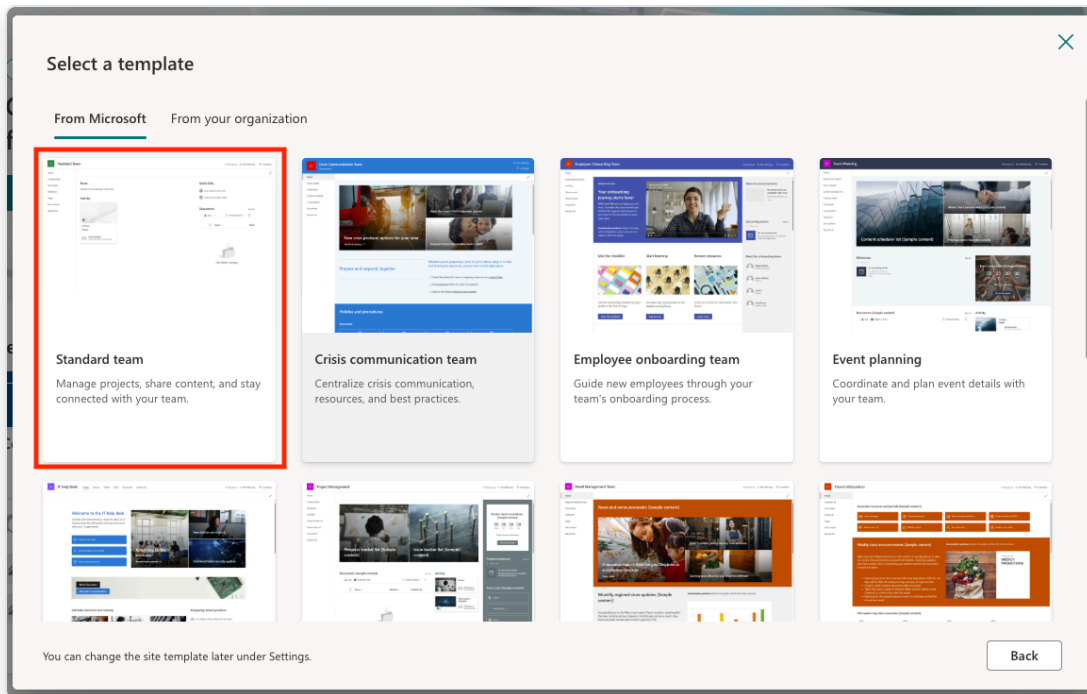
Create Site

3. Select **Team Site**



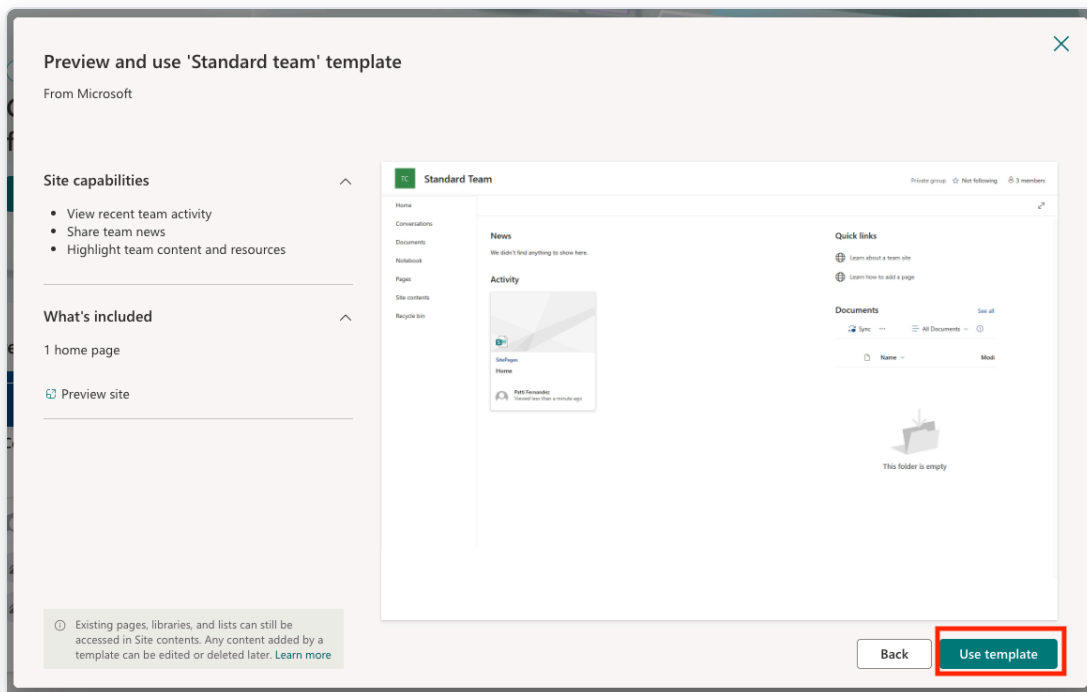
Team Site

4. Select **Standard team**



Standard Team

5. Select **Use Template**



Use Template

6. Put **MBR - <Your User Name>** in the Site Name and Select **Next**

Give your site a name

Decide on a unique name that follows your organization's naming standards. The description is optional, but useful for people to understand what your site is for.

Your team site will be connected to a Microsoft 365 group, which gives your site a shared OneNote notebook, group email address, and team calendar.

Standard team [Change template](#)

Site name *
MBR_
The site name is available.

Site description
Tell people the purpose of your site

Group email address *
MBR_
The group alias is available.

Site address *
https://capowerplatform2407.sharepoint.com/sites/ MBR_
The site address is available.

[Back](#) [Next](#)

Create Site

7. Click **Finish**

Learn more about permissions' and 'Site owners have full control of site content, theme, permissions, hub associations, and other site settings.' and 'Site members can edit and view site content, including files, pages, lists, and navigation.' Below this is a preview of a 'Standard team' site template. The right pane, titled 'Add members', contains a text input field with the placeholder 'Start typing a name'. At the bottom right, there are 'Redirecting' and 'Finish' buttons, with the 'Finish' button highlighted by a green circle."/>

Add site owners and members

Consider assigning one additional site owner or a group to help manage site content. [Learn more about permissions](#)

Site owners have full control of site content, theme, permissions, hub associations, and other site settings.

Site members can edit and view site content, including files, pages, lists, and navigation.

Standard team

Add members
Start typing a name

[Redirecting](#) [Finish](#)

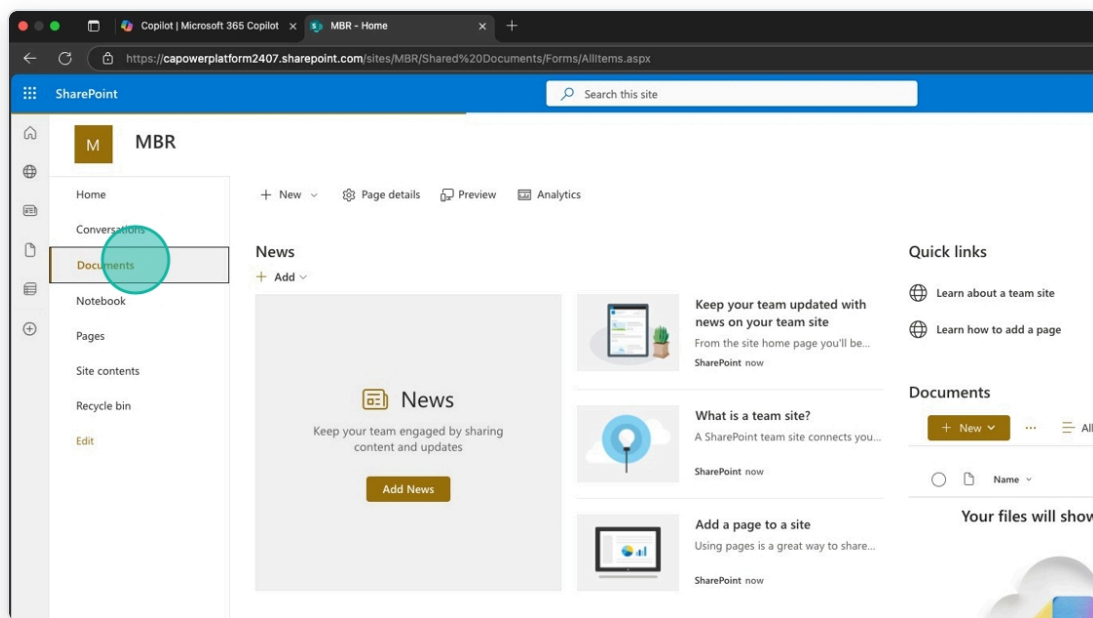
Select Finish

Upload MBR documents



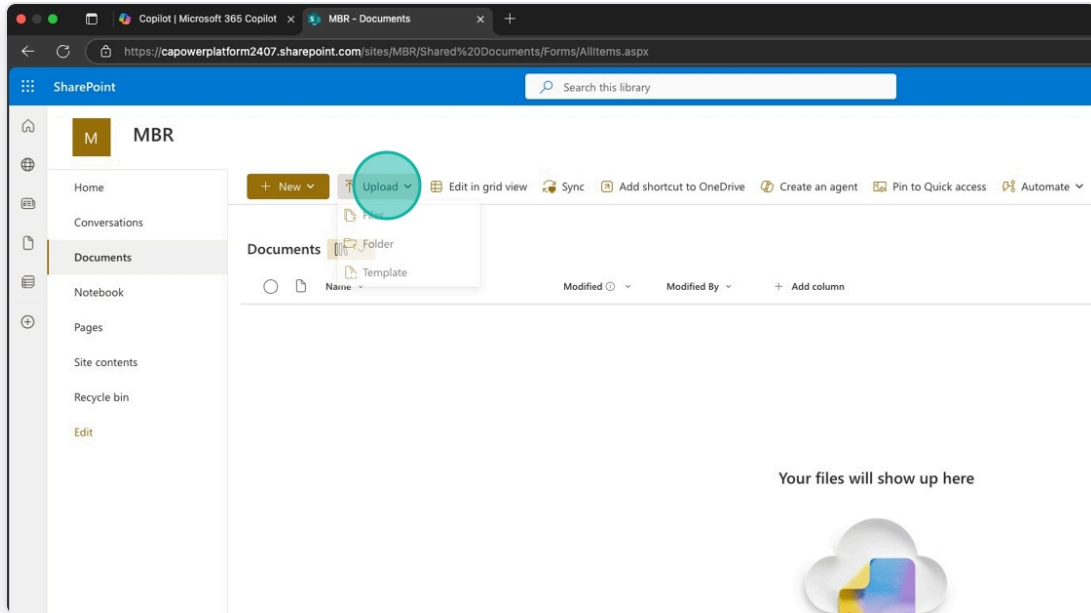
IMPORTANT: For training participants: If you are following this lab as part of a guided training session, the MBR documents have already been uploaded to SharePoint at the location specified in your **Lab Resources**. You can skip this use case and proceed directly to [Use Case #2](#).

8. Navigate to the [sample files folder](#) and download the sample files
9. Select **Documents** in the left navigation



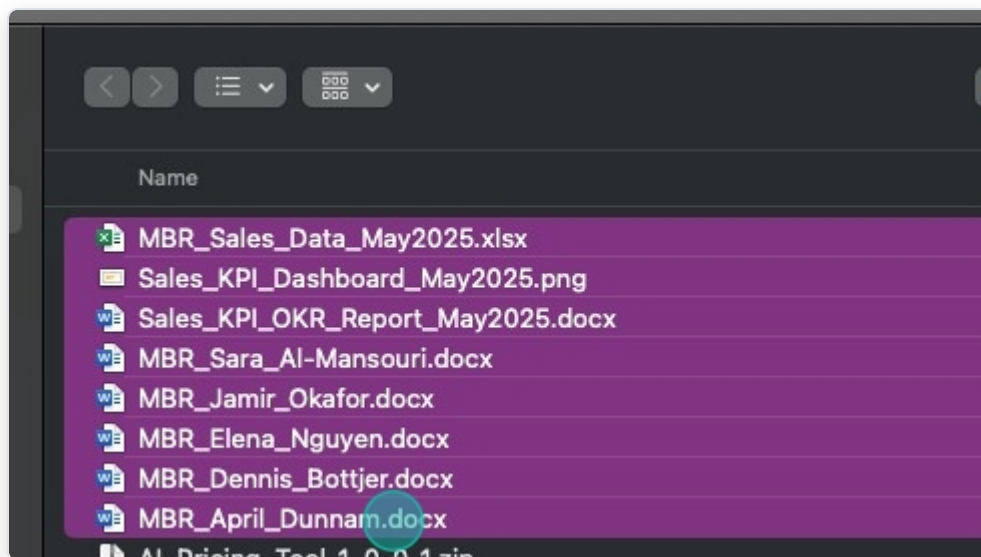
Open Document Library

10. Select **Upload**



Upload Files

11. Select all the sample files you just downloaded and click [Open](#)



Select Open

Congratulations! You've set up your SharePoint site with MBR

documents!

Test your understanding

Key takeaways:

- **Centralized storage** – SharePoint provides a secure, accessible location for business documents
- **Document organization** – Proper file structure enables better agent knowledge extraction
- **Access permissions** – SharePoint security ensures only authorized users can access sensitive MBR data

Challenge: Apply this to your own use case

- What other business review documents could benefit from AI agent analysis?
- How would you organize files to make them more discoverable by agents?
- What security considerations are important for your organization's sensitive documents?

Use Case #2: Build and deploy MBR agent

Create an intelligent conversational agent that can analyze your MBR documents and provide instant insights.

Use case	Value added	Estimated effort
Build and deploy MBR agent	Create intelligent agent that analyzes MBR documents and provides instant insights	10 minutes

Summary of tasks

In this section, you'll create a Copilot Studio agent, connect it to your SharePoint documents, test its capabilities, and deploy it back to SharePoint for team access.

Scenario: Build an AI assistant that can instantly answer questions about MBR content, identify common risks and themes, and help leadership prepare for business reviews more efficiently.

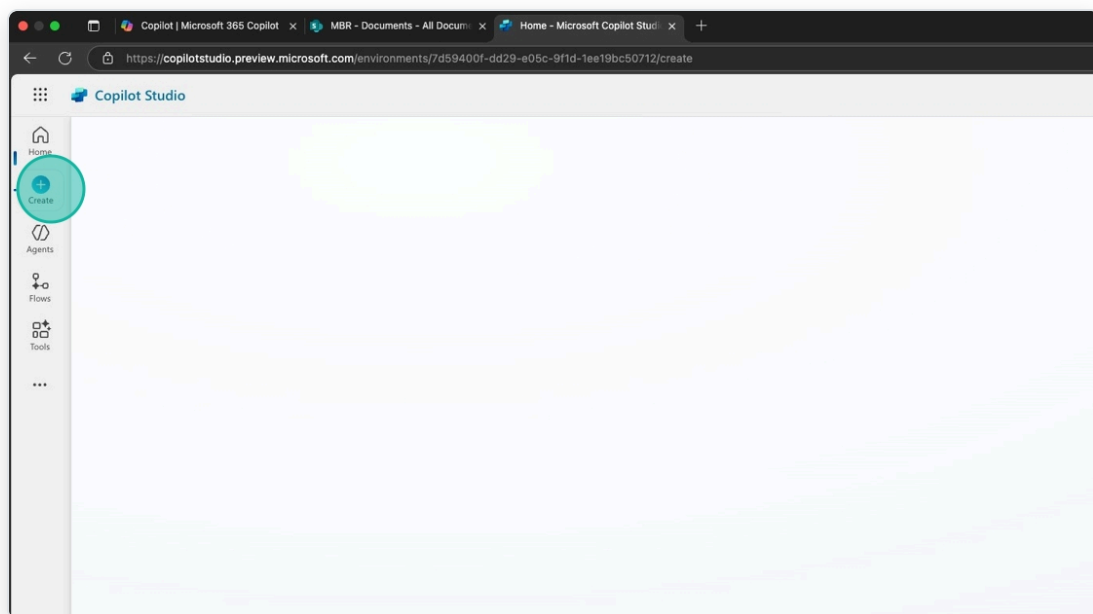
Objective

Create, configure, test, and deploy a conversational MBR agent that leverages SharePoint documents as its knowledge source.

Step-by-step instructions

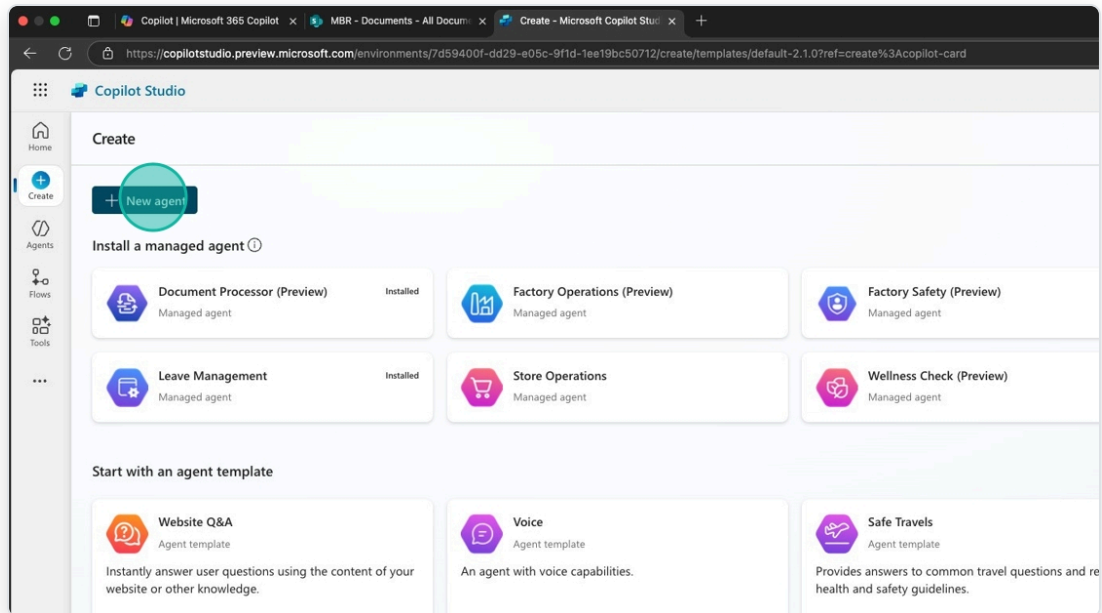
Create the agent in Copilot Studio

1. Open a new browser tab and navigate to copilotstudio.microsoft.com (<https://copilotstudio.microsoft.com>). Select **Create**



Select Create

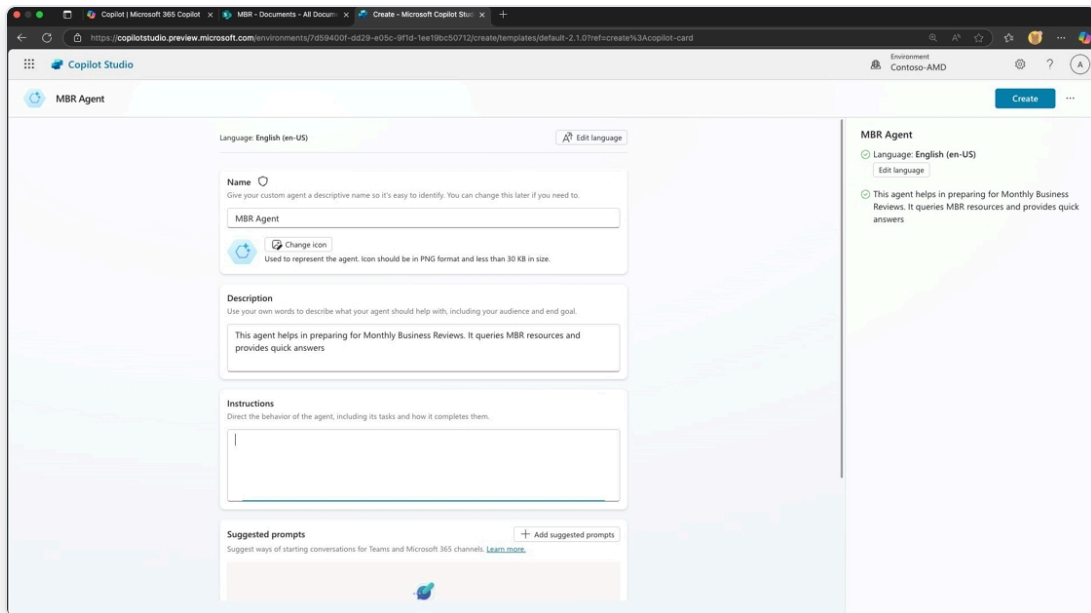
2. Select **New agent**



Select New Agent

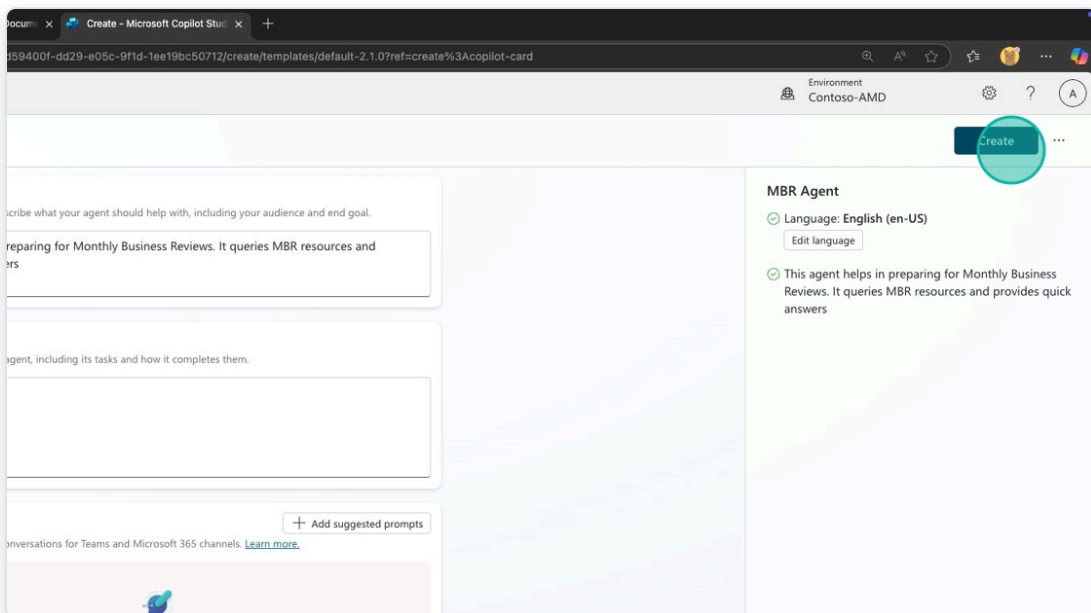
3. Select the **Configure** tab

4. In the **Name** field type **MBR Agent**. In the **Description** field type, **This agent helps in preparing for Monthly Business Reviews. It queries MBR resources and provides quick answers**



Fill out Agent Details

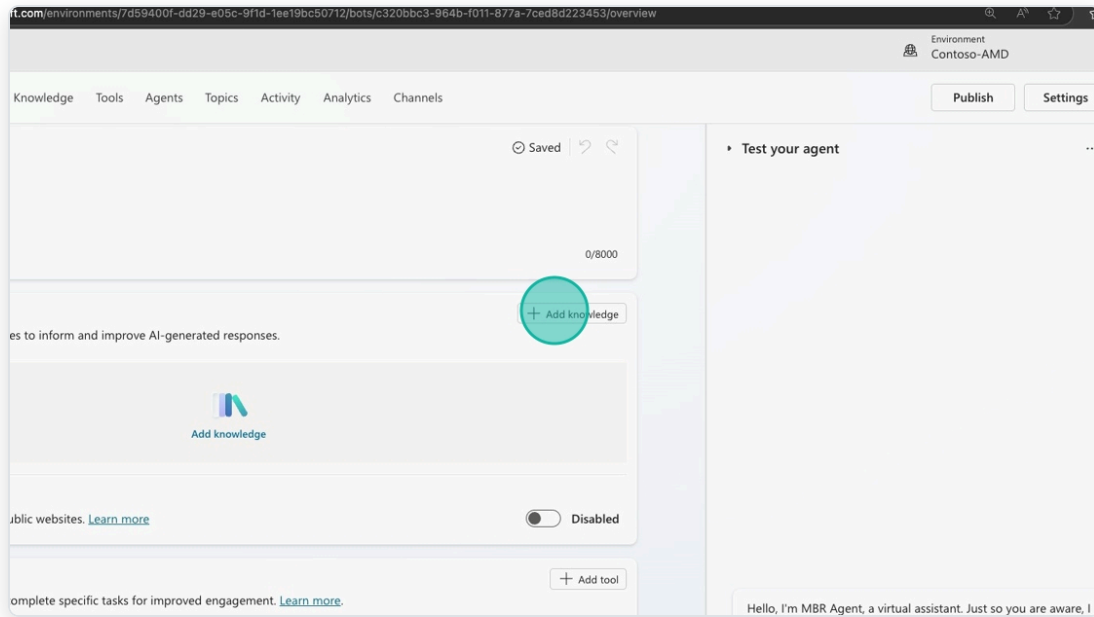
5. Select  to go into **Edit advanced settings**. Make sure the agent is created as part of one of your **solutions**.
6. Select **Create**



Select Create

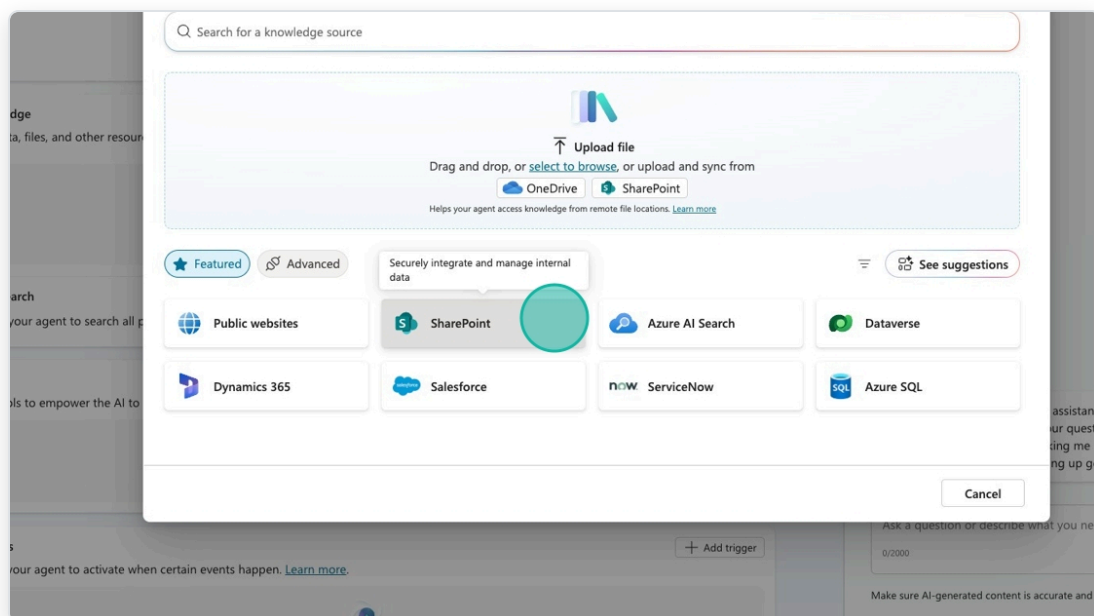
Add SharePoint knowledge source

7. Select Add knowledge



Select Add Knowledge

8. Select SharePoint

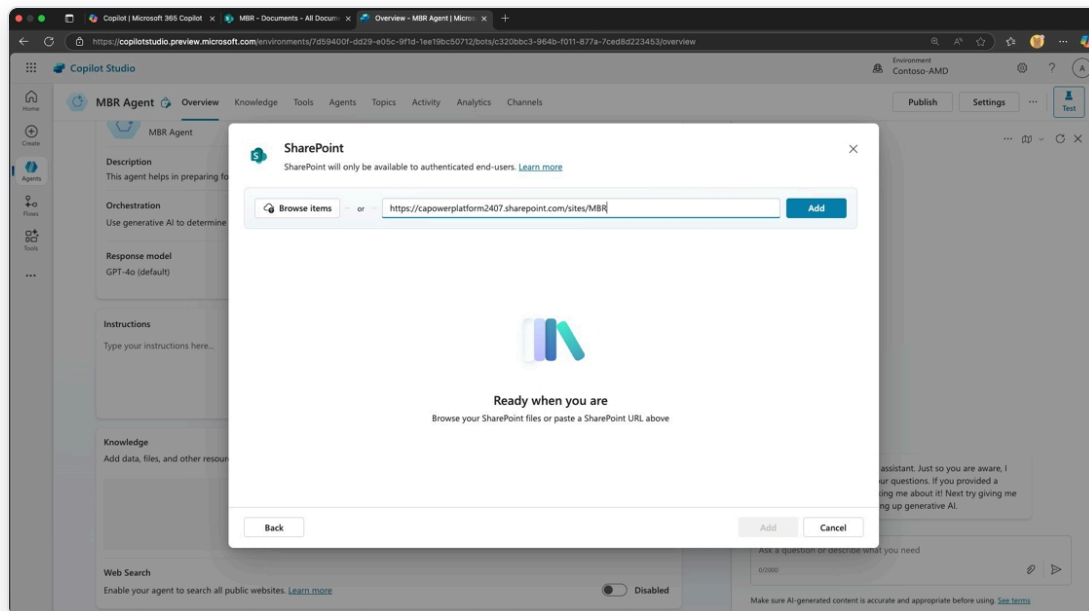


Select SharePoint

9. **Paste** the URL of your SharePoint site folder where the MBR documents are located in the text input

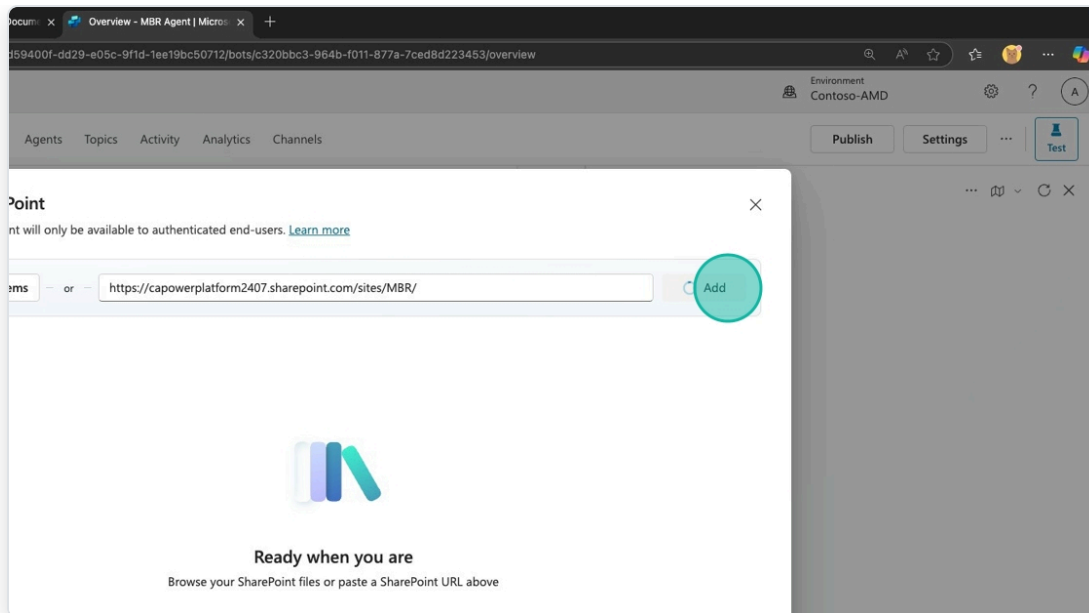


IMPORTANT: If these files have already been uploaded for you, use the URL provided in **Lab Resources** (specific per training).



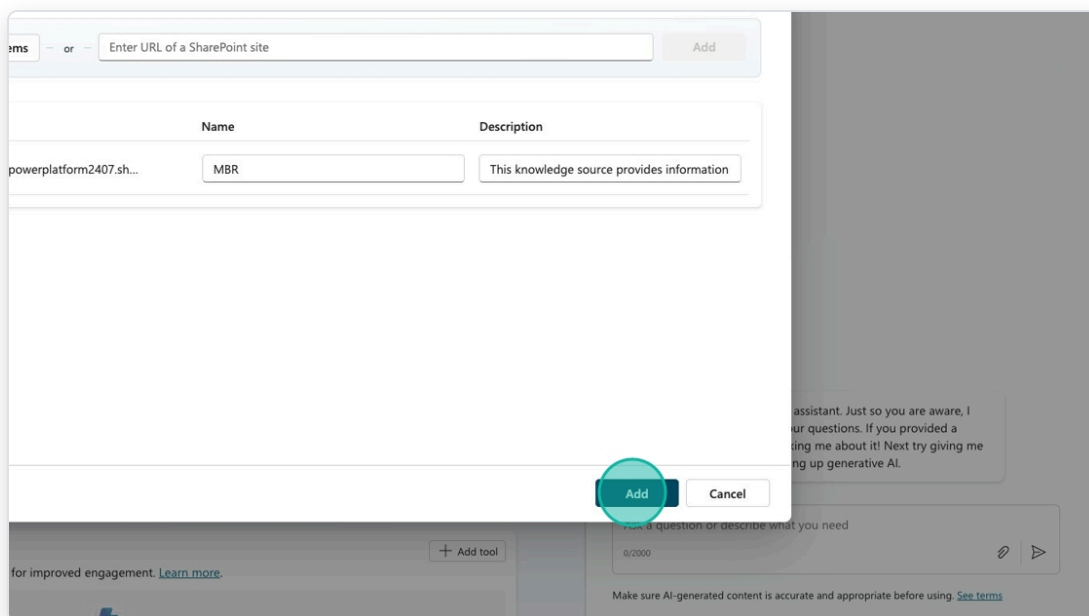
Paste SharePoint URL

10. Select **Add**



Select Add Knowledge

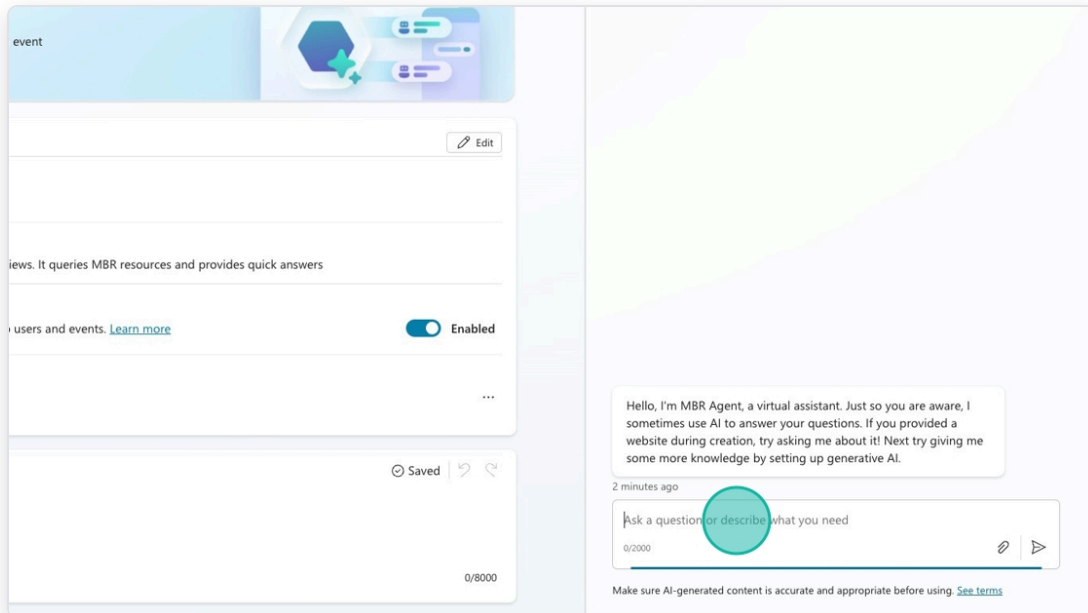
11. Select **Add** again



Select Add

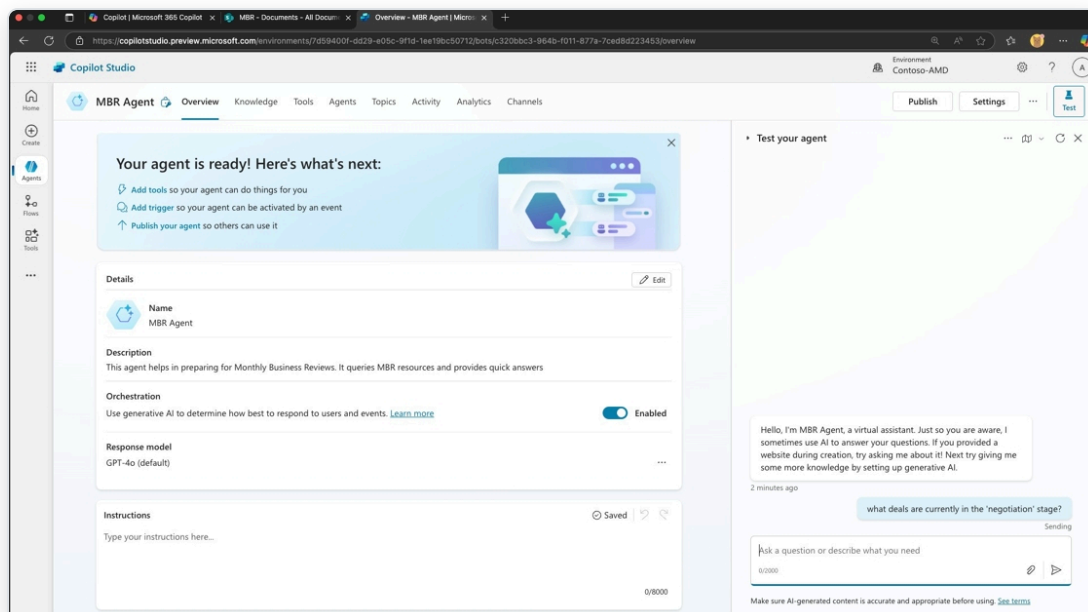
Test the agent

12. Now we need to test our agent to see if it returns answers from our knowledge.



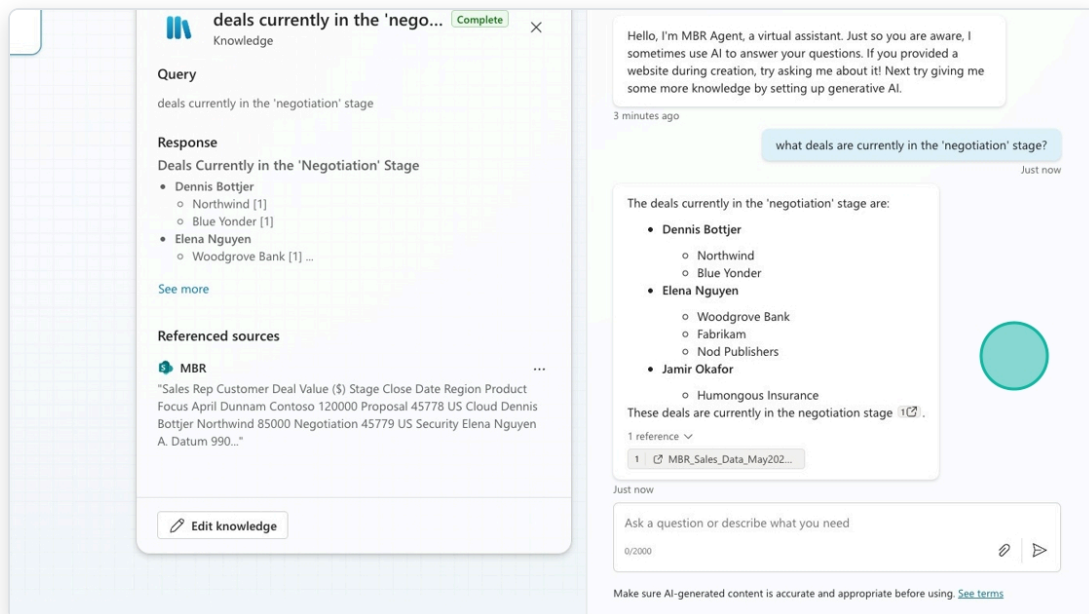
Test Panel

13. Type **what deals are currently in the negotiation stage?** and send the message.



Test the agent

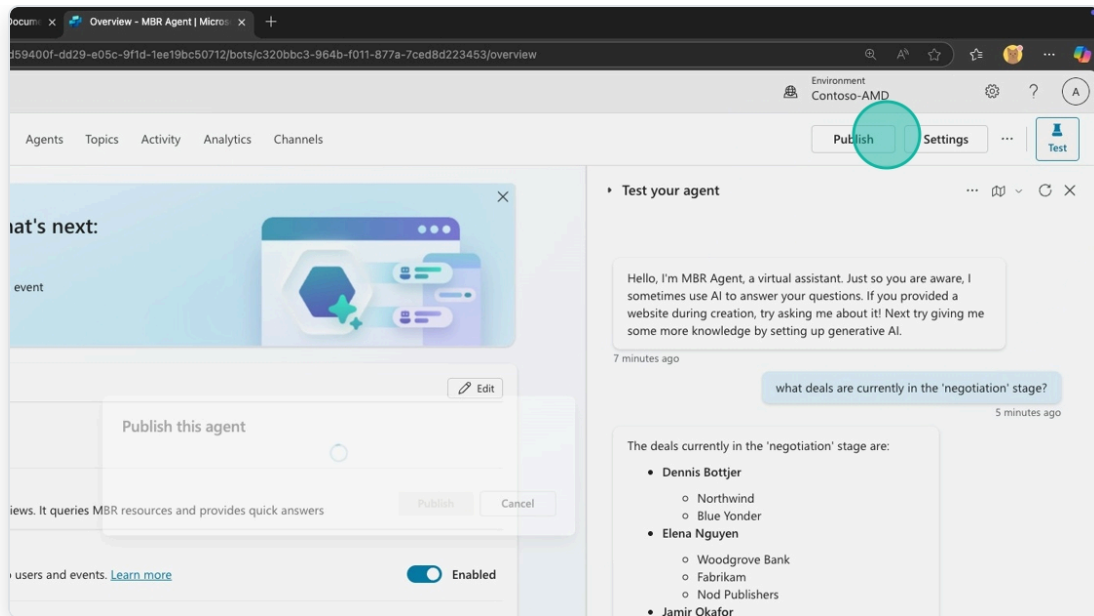
14. **Review** the answer in the test window and notice the logic in the Activity Pane on the left hand side



Review the answer

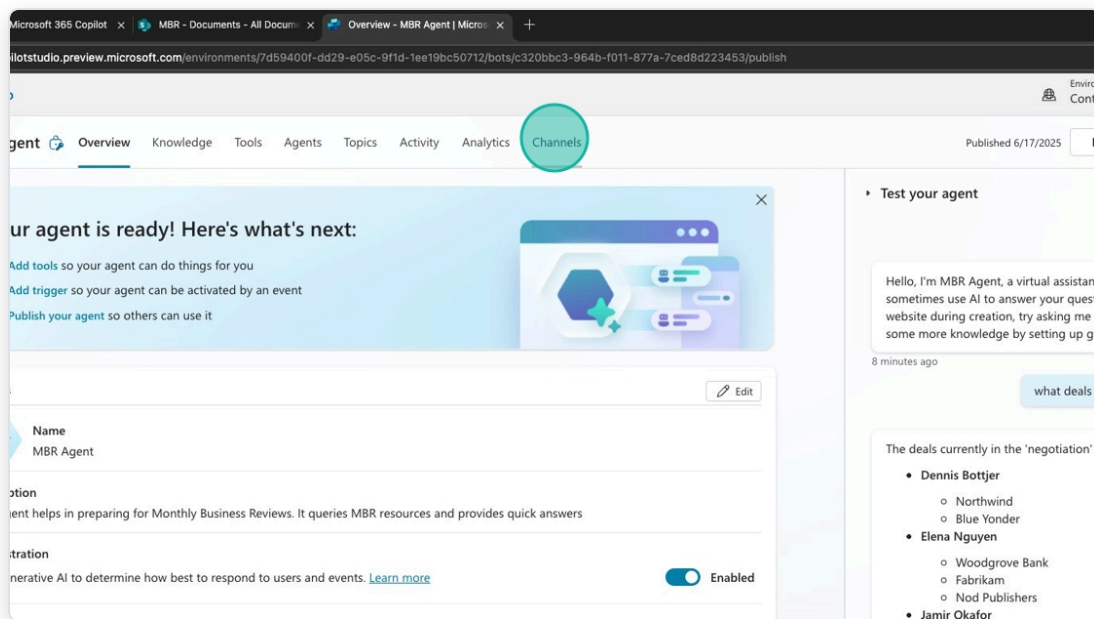
Publish and deploy to SharePoint

15. Now that we know the agent is working, we need to publish our changes by selecting the **Publish** button in the upper right hand corner.



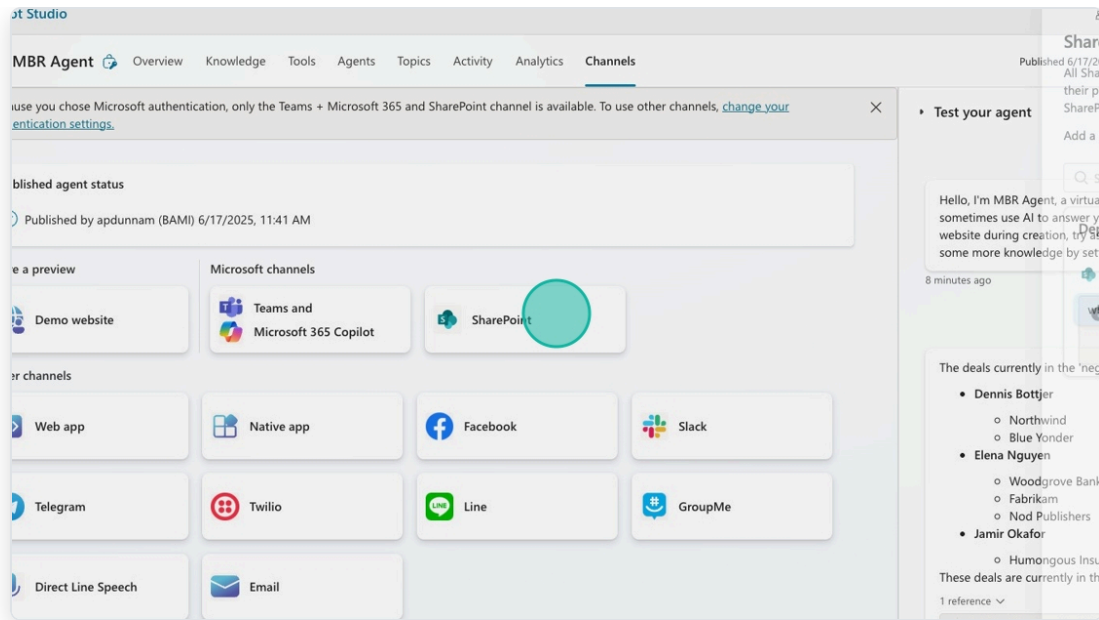
Select Publish

16. Now it's time to deploy our agent to SharePoint. Select the **Channels** tab.



Select Channels

17. Select **SharePoint**

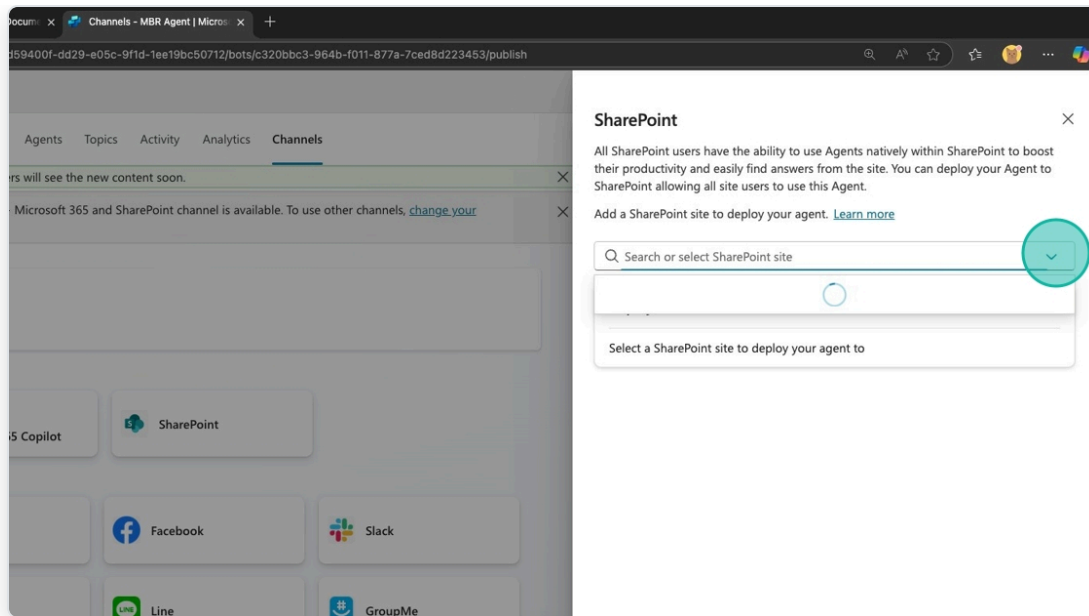


Select SharePoint

18. **Select** or **search** the SharePoint site you created in the previous steps from the list of options

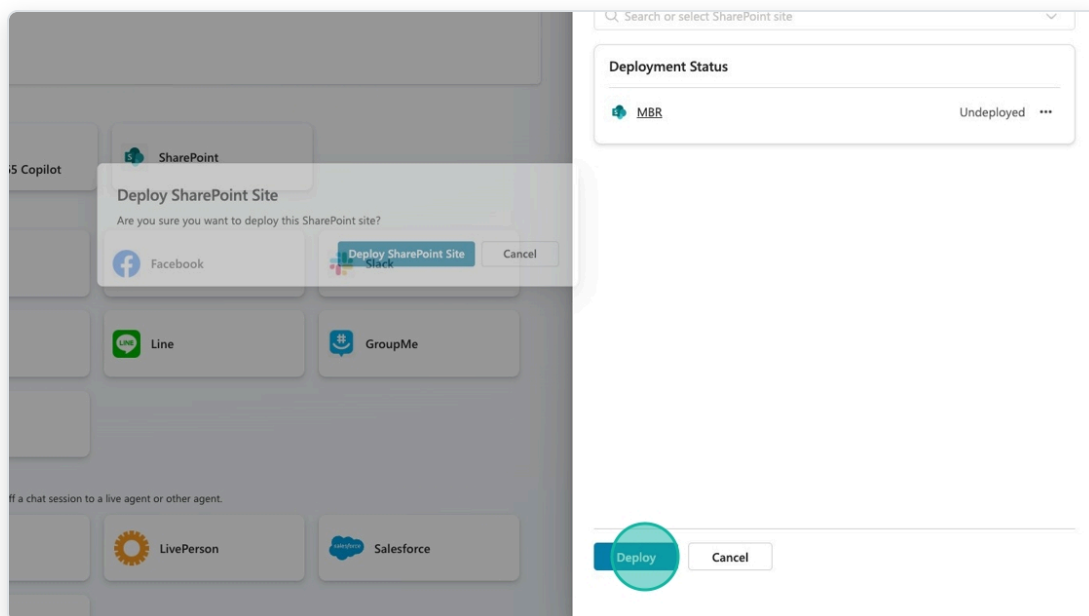


IMPORTANT: Only sites where the user has **Edit** permissions can be used. Otherwise, an error will be displayed.



Select the SharePoint Site

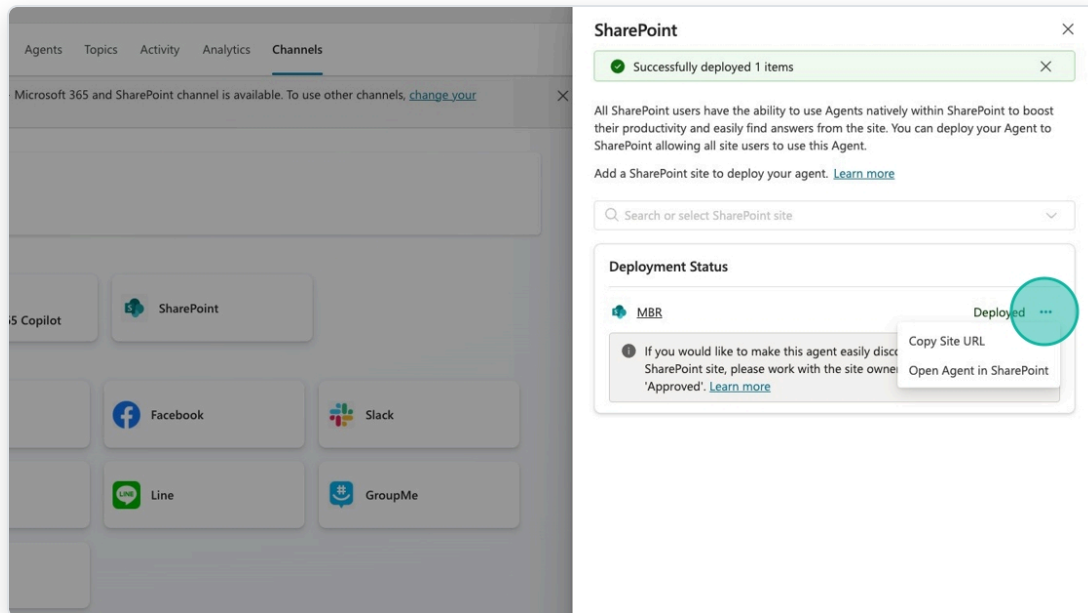
19. Select **Deploy**



Select Deploy

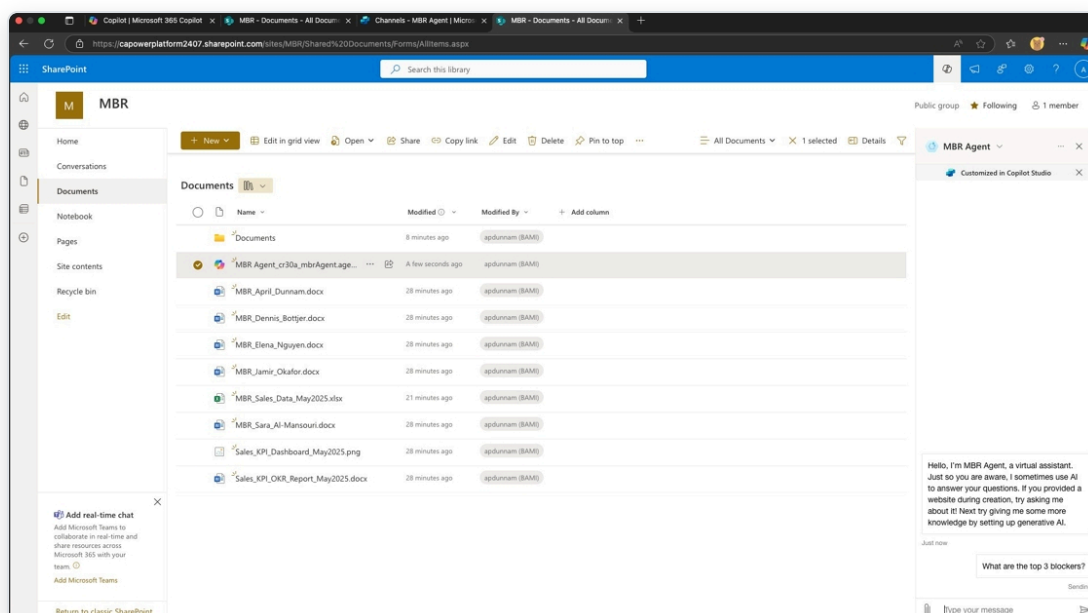
Test the deployed agent

20. Select the **...** next to the Deployed text and select **Copy Agent Url**. Open a new browser tab and paste in the URL.



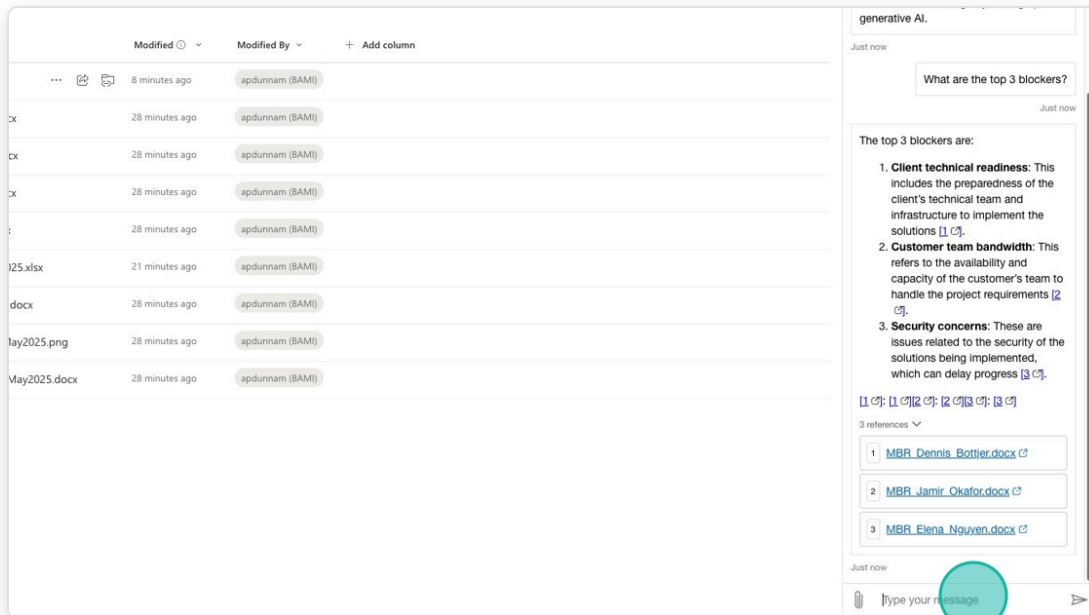
Select Copy Site URL

21. Your agent will open up in SharePoint. Test it out by typing **What are the top 3 blockers?** in the text input and pressing **Return**



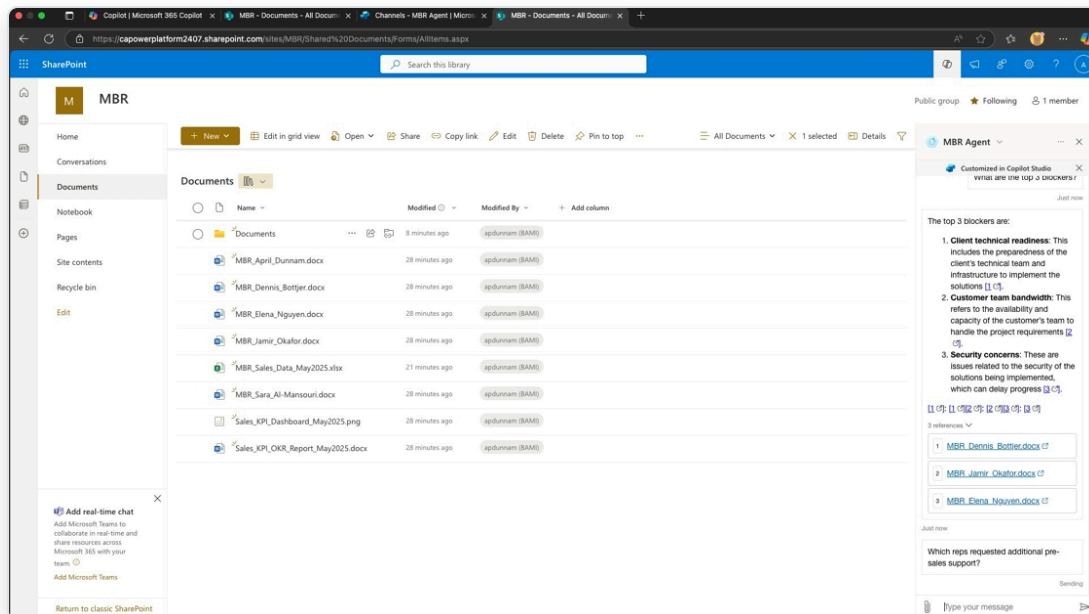
Testing the agent

22. Review the answer and note that it provides links to the referenced documents.



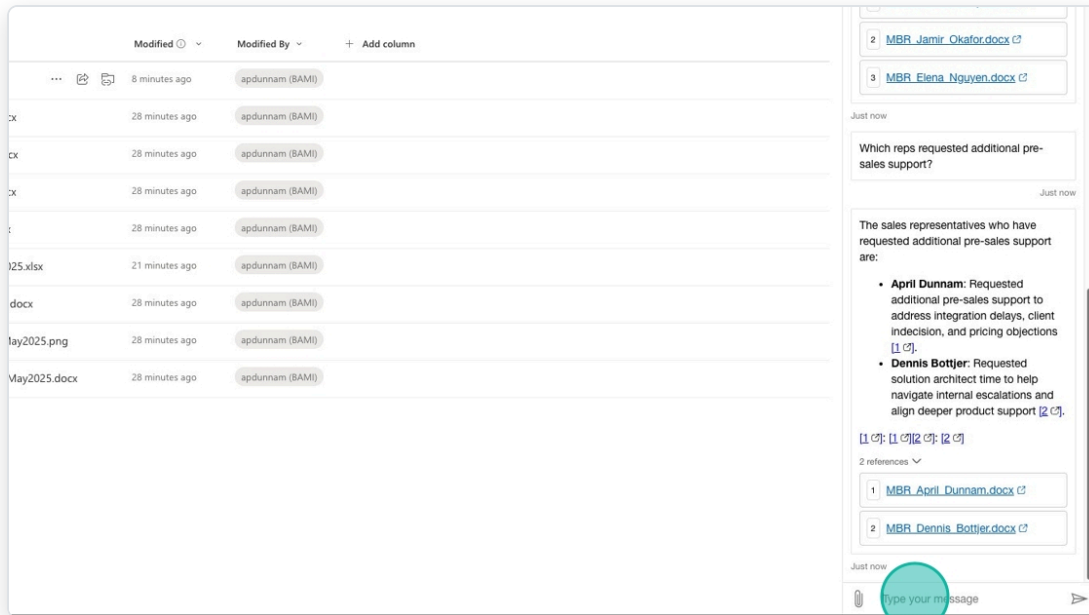
Review the first test

23. Perform another test by typing **Which reps requested additional pre-sales support?** and pressing **Return**



Testing the agent

24. Review your response. Congratulations! You've built and deployed your SharePoint MBR Agent!



Review the second test results

Congratulations! You've built and deployed your SharePoint MBR Agent!

Test your understanding

Key takeaways:

- **Knowledge integration** – Agents can directly access and analyze SharePoint documents for contextual responses
- **Testing importance** – Always validate agent responses before deployment to ensure accuracy

- **Deployment flexibility** – Agents can be deployed directly to SharePoint for seamless user access
- **Reference linking** – Well-configured agents provide source citations for transparency and verification

Lessons learned & troubleshooting tips:

- Test with various question types to ensure comprehensive knowledge coverage
- Check that agent responses include proper source citations
- Verify deployment permissions align with your organization's security requirements
- Remember that agents need time to index new documents after knowledge source updates

Challenge: Apply this to your own use case

- What other business processes could benefit from document-based AI agents?
- How would you customize the agent's instructions for different audiences (executives vs. managers)?
- What additional knowledge sources could enhance the agent's capabilities?
- How might you structure MBR documents to optimize agent performance?

Summary of Learnings

True learning comes from doing, questioning, and reflecting—so let's put your skills to the test.

To maximize the impact of your MBR Agent:

- **Document organization matters** – Well-structured SharePoint libraries enable better agent knowledge extraction and more accurate responses
- **Test comprehensively** – Validate agent performance with realistic business questions before deploying to stakeholders
- **Leverage source citations** – Agents that provide document references build trust and enable users to dive deeper into source material

- **Deploy strategically** – SharePoint deployment puts the agent where users naturally work with documents
 - **Iterate based on feedback** – Monitor agent usage and refine knowledge sources based on common user questions and needs
-

Conclusions & Recommendations

MBR Agent golden rules:

- Keep MBR documents in consistent formats and naming conventions for optimal agent understanding
- Test agent responses against known document content to ensure accuracy before deployment
- Use specific, business-relevant questions during testing to validate real-world usefulness
- Deploy agents to locations where users naturally work to maximize adoption
- Regularly update knowledge sources to keep agent responses current and relevant
- Monitor common user questions to identify knowledge gaps and improvement opportunities

By following these principles, you'll create MBR agents that not only provide accurate information but transform how leadership teams prepare for and conduct business reviews, turning hours of manual document review into minutes of intelligent conversation.
