



CUSTOMER ZERO

Frontier Company AI Transformation Story

APRIL 2026

Frontier Firm

An AI-powered,
human-led
organization



Frontier Firm success framework



Enrich

employee experiences



Reinvent

Customer engagement



Reshape

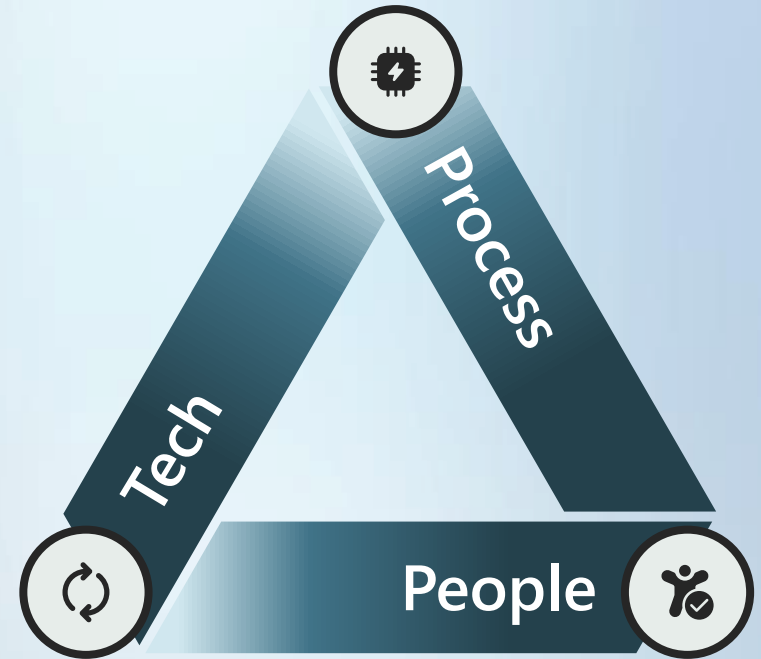
Business processes



Bend the curve

on innovation

Getting to the AI frontier
requires shifts in technology,
process, and people



Frontier Firms measure transformation through business outcomes



Innovation & revenue growth



Quality



Speed



Customer & employee experience



Increased workforce capacity



Productivity/cost

Our approach relies on three recipes

Informed by nearly 100 case studies

Vision & Goals

RECIPE 1



**Persona
Acceleration**

Empowering specific roles (e.g., sellers, support agents) with AI tools tailored to their workflows.

RECIPE 2



**AI powered workflow
optimization**

Reinventing existing processes with AI to improve outcomes.

RECIPE 3



**AI-first
Incubator**

Designing new work from scratch, with AI at the center of how the team operates.

Enablers of transformation

People



Invest in skilling, change management, role and team evolution, and culture; this is a **business transformation**.



Empower teams to **experiment**; foster new ideas, learn, and accelerate buy-in.

Continuous Improvement



Map AI to real workflows; use **continuous improvement techniques** to connect AI to impact.



Embrace failures; **scale and amplify successes**.

Technology Solutions



Get **data and governance** right early; they accelerate development and build trust.

Measurement



Instrument and measure progress against goals to create a **self-reinforcing cycle of improvement**.



Establish an **AI Center of Excellence** to set priorities and grow scale, reuse, and consistency.

ENRICH & RESHAPE / DEMOS

Microsoft in action: agents at work

Real-world demos from inside Microsoft, showing how custom agents and out-of-the-box M365 agents enrich employee experience and reshape everyday workflows.

Clipboard: Paste, Cut, Copy, Format Painter

Slides: New Slide, New Slide with Copilot, Layout, Reset, Section

Font: B, I, U, S, AV, Aa, [Color], [Background Color], [Text Direction], [Align Text], [Convert to SmartArt]

Paragraph: [Bulleted List], [Numbered List], [List with Symbols], [List with Discs], [List with Squares], [List with Triangles], [List with Circles], [List with Diamonds], [List with Stars], [List with Hearts], [List with Spades], [List with Clubs], [List with Diamonds], [List with Stars], [List with Hearts], [List with Spades], [List with Clubs]

Drawing: [Shapes], [Arrange], [Quick Styles], [Shape Fill], [Shape Outline], [Shape Effects]

Editing: Find and Replace, Replace Fonts, Select

Voice: Dictate

Sensitivity: [Sensitivity]

Add-ins: [Add-ins]

Copilot: Design Suggestions

8 Microsoft in action: agents at work

9 Microsoft Teams Facilitator

10 [Screenshot of Teams meeting]

11 [Screenshot of Teams meeting]

12 April Team meeting

13 [Screenshot of Teams meeting]

14 [Screenshot of Teams meeting]

Microsoft Teams Facilitator

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Click to add notes

Claude Opus 4.7

pump up slide 9

Copilot

Performing required actions

- Gathering information: Collecting context about your presentation.
- Performing required actions: Executing the tasks needed to fulfill your request.

Edit

Describe what you'd like to create or edit

+

AI-generated responses may be incorrect

Microsoft Teams Facilitator

An out-of-the-box M365 agent that turns every meeting into action.

01

Real-time notes

Captures decisions, key points, and follow-ups as the meeting unfolds.

02

Action items

Detects owners, due dates, and next steps so nothing falls through.

03

Recap & summary

Posts a concise post-meeting recap to the chat for everyone, even those who missed it.

04

Stay on track

Surfaces agenda items and timing nudges so meetings stay focused.



Roadmap

Product readiness

Launch campaign



Mario Rogers



Sydney Mattos



Lisa Taylo



Daniela Mandera



Danielle Booker



Jessica Kline



Kat Larsson



Allan Munger

Meeting chat



help in this meeting:

- Track the agenda
- Take notes
- Set a timer
- Answer questions

Just type @Facilitator to ask me anything.

Ask Facilitator



Facilitator - AI generated 12:03 PM

Here's the agenda from the invite:

- Roadmap
- Product readiness
- Launch campaign



12:07 PM

Facilitator add Success metrics to the agenda and allocate 5 minutes to it

Type a message





Tuesday 10:04 AM Meeting ended: **1h 4m 26s**

April Team meeting

Tuesday, April 21, 2026 9:00 AM - 10:00 AM

🗣️ 13 speakers
✅ 14 tasks

🔄 Recap ▼

Transcript

Attendance

team meeting april.pptx

+1

🕒 Expires in 85 days

🛑 Tuesday 10:04 AM Recording stopped.

👤 Conf Room Budapest-M/209A (12) Chuck Norris left the chat.

Facilitator Tuesday 10:05 AM



Everyone—that's a wrap. Here's the complete rundown of today's meeting.

April Team meeting
General

MIRP tool, as Claudia has direct access to the product team.

- Arpad clarified that for customers with only on-premises products, participants should continue using the PPT version of MIRP, as digital MIRP is not meaningful for these customers.

Customer workload management

- Edit offered to share the new PPT instructions for attaching workloads in CX Observe with Assel after both experienced access issues.

Milestone management

- Arpad reviewed Q4 milestone close rates, emphasizing the importance of closing April milestones at or above their initial value and monitoring for potential cancellations that could create significant gaps.

Regional infrastructure



April Team meeting

Apr 21, 2026 · 9:00 AM - 10:00 AM · Arpad Hody

📎 2 ▾

👤 View recap

AI-generated content in notes may be incorrect. [Learn more](#)

Decisions

- Priorit
- Initiat
- Nomin
- Transi
- Monit
- Comm



Open questions

- Unclear t
- Digital M
- Best meth
- CSA supp
- Risk of un



Agenda

📅 **Goal:** Prioritize tasks and address unified delivery coverage and the implementation of the six box model.



Customer health programs

- Eva initiated a [REDACTED] month, but these activities were not yet [REDACTED]
- Eva shared the [REDACTED] needed and they explained how to identify [REDACTED]

Customer engagement and scoping

- Eva explained that the scoping call with the customer proceeded without critical workloads or telemetry, and they worked together to identify the critical workloads.

Digital MIRP transition

- Arpad informed [REDACTED] the digital MIRP [REDACTED]
- Arpad advised [REDACTED] finished, [REDACTED] to demonstrate [REDACTED]
- Arpad clarified [REDACTED] premises [REDACTED] products should [REDACTED]
- Arpad instructed [REDACTED] as [REDACTED] Claudia has [REDACTED]
- Arpad clarified [REDACTED] n of [REDACTED] MIRP, as digital [REDACTED]

Customer workload management

- Edit offered to share the new PPT instructions for attaching workloads in CX Observe with Assel after both experienced access issues.

Milestone management

Arpad and Claudia piloted [REDACTED] during the [REDACTED] of [REDACTED] April pilot [REDACTED] their initial [REDACTED]

Follow-up tasks

🏠 ↕ ⌵ ↔ ...

Task apps ▾

	🕒 Task	👤 Assigned to	📅 Due date	📁 Bucket
1	🕒 Arpad instructed Eva, Mihai, and Sasha to book their re-coverage	Add assignee	Select date	
2	🕒 Share the referen			
3	🕒 Arpad value p custom contract and ma			
4	🕒 Nomin security rate (Al			
5	🕒 Set clea that en provide include			
6	🕒 Ensure CX Obs custom teleme			

REDACTED

PowerPoint Frontier



4

5

6

7


8


9

10


Enablers of transformation


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 Establish an **AI Center of Excellence** to set priorities and grow scale, reuse, and consistency.

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Claude Opus 4.7

Let's edit your presentation

Allow editing

Translate slide 8 to Hungarian. Keep formatting. Try to keep the Hungarian text at the same length of English one to be able to keep the formatting. AI should not be translated. Use AI-ok or AI alapú or similar.

Excel Frontier



File Home Insert Draw Page Layout Formulas Data Review View Automate Help

Clipboard: Paste, Cut, Copy, Format Painter

Font: Aptos Narrow, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Left, Center, Right, Indent, Wrap Text, Merge & Center

Number: Custom, Currency, Percentage, Decimals

Styles: Normal, Bad, Good, Neutral, Calculation, Check Cell, Explanatory T..., Input, Linked Cell, Note

Cells: Insert, Delete, Format

Editing: AutoSum, Fill, Clear, Sort & Filter, Find & Select, Sensitivity, Add-ins

Comments, Share

G8 6000

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z

Opus 4.7

Let's edit your workbook

Allow editing

Describe what you'd like to edit

Organize the data in this workbook

Create a summary of this workbook

Analyze this workbook and add data insights

M365 Copilot (Premium)

Custom Agents



Customer Success Agent v2

This Experience Works Best with Specific, Targeted Prompts and Does Not Support Open-Ended Conversations. Below are the primary prompt categories, highlighting the most commonly used prompts. These are designed for quick, structured queries that return clear, direct answers. For a complete list of sample prompts, please refer to the [Prompt Guide](#)

Know my customer (Use these prompts to uncover key insights about your customer)

- Who is the current CSAM assigned to Bank of America?
- Show me the account team for walgreens and their roles
- Show me all planned deliveries for Contoso in the next 90 days.

Prepare

(Use these prompts to get ready for your day based on your role)

- Show me customers with high priority open customer health recommendations
- Show me all customer health recommendations that have been acknowledged but are waiting for action or postponed for my customer
- Which of my customers are eligible for Enterprise Security Assessment

Plan

(Use these prompts to plan your day based on your role)

- Show me all customer health recommendations for customer
- Which of my customers have support areas with high avoidable case rates?
- Lists customer health recommendations have been in 'Acknowledged' status for more than 14 days?

Deliver

(Use these prompts to support and progress customer delivery)

- Show my daily time entry summary for today / yesterday
- Show my submitted / draft entries for today / yesterday / Monday / last Monday
- Show my weekly time entry summary

Message Copilot



Cowork.

Where humans and AI agents *build the next hour of work, together.*

1 + 1 = 3 Human + agent
leverage

24 / 7 Always-on
collaboration

0 friction In the flow of
work



What should we tackle next?

mol-2025-integrated-an... X

Based on the attached annual report, based on Microsoft software offerings, other oil and gas related experience focusing on HQ, downstream, upstream, retail territories create a presentation that a Microsoft account executive can pitch to CxO level at MOL how MOL and Microsoft can collaborate, how to position CRM, M365, Azure and how ISD and Support can help acceleration MOL goals.



Get to work

- Organize my inbox
- Arrange my week
- Prep for a meeting
- Research a company



From hundreds of agents to a guided coworker

Fewer agents, deeper integration, and an interface that shows you what AI can do.

TODAY

300+

internal agents at Microsoft

Each one purpose-built for a single task — code review, expense triage, ticket routing, sales prep. Powerful, but employees have to know which bot to summon and how to prompt it.

THE SHIFT

Fewer.

Deeper integration per agent

We are consolidating dozens of narrow agents into a few broader coworkers — each connected to more data, more tools, and more workflows. Less switching, more compounding context.

THE NEW UI

Beyond the chat box.

Tailored dashboards, interactive cards, and guided navigation replace blank text prompts — so users see what the agent can do before they have to ask.

WHY VISUAL UI BEATS A TEXT-ONLY CHAT

Discoverable — users see the agent's capabilities at a glance. **Faster** — one click on a card beats writing a perfect prompt. **Less guesswork** — guided navigation removes the blank-page problem and lifts adoption.

RECENT CHATS

- Show me the Contoso Heal...
- Show me health remediatio...
- Analyze consumption trend...
- Show me health recommen...
- Show me the Contoso Succ...

Show 4 more

Consumption trending strongly above target, expansion stalled by stakeholder turnover.

Explore with Agent

Usage growth has stalled and is down last month-over-month despite license availability.

Explore with Agent

Customer health and scoring edge are eroding relationship health.

Explore with Agent

Customer health is pending from stakeholder alignment after leadership change.

Explore with Agent

Actions

- All (16)
- Consumption (9)
- Usage (8)
- Customer Health (6)
- Customer Delivery (5)

Showing 1-4 of 16 actions

Critical

Initiate Health Success Program

Updated 3 minutes ago by Health Agent

Contoso

Customer Health Customer Delivery

Contoso health score declining. Review health metrics and approve to start the success program and prioritization meeting.

Review

Critical

Priorities Missing CSP

Updated 3 hours ago by Consumption Agent

Contoso

Consumption Usage

Account not mapped to a CSP and accounts for 30% (\$2.5M) of uncovered revenue. CSP coverage needed to protect pipeline.

Create CSP

Critical

Milestones Blocked or At Risk

Updated 30 minutes ago by Consumption Agent

Contoso

Consumption Usage

Azure OpenAI Production Deployment milestone is at risk — 40% complete with 3 days until due date. \$1.4M ACR impact.

Review Milestone

Critical

Unmapped Projects

Updated 5 days ago by Consumption Agent

Contoso

Consumption Usage Customer Delivery

10 unmapped projects (Support, FastTrack, Consulting, Azure Migrate) require linkage to a CSP for strategic alignment.

Link Projects

- Home
- Portfolio Dashboard
- Agent Feed

RECENT CHATS

- Initiate Health Success Pro...
- Show me the Contoso Heal...
- Show me health remediatio...
- Show me health recommen...
- Show me the Contoso Succ...

Show 5 more

Show me the Contoso Health Success Program

Agent

I've analyzed the telemetry for Contoso. A Success Program is recommended due to low resiliency scores across production workloads.



Customer health success program

Contoso · TPID: 24211244 · Manufacturing · 10,000+ · North America



Customer detail

Contoso health posture

Security ESA Findings

50 /100

Unactioned

Security

15 /100

Unactioned

Azure High Availability

05 /100

Unactioned

ESA Eligibility

20 /100

Unactioned

Express Route

10 /100

Unactioned

Disaster Recovery

10 /100

Unactioned

Service Health Alert

10 /100

Unactioned

Reactive

10 /100

Unactioned

Other

10 /100

Unactioned

Initiate success program

1. Review health report

Summary

AI-generated content may be incorrect

Based on the current resiliency, security, and incident readiness posture of Contoso, this is the right time to formally initiate the Success Program. It gives a structured path to close risk gaps, improve uptime, and demonstrate measurable operational maturity.

Key drivers

Based on historical engagement patterns and current telemetry, the following outcomes are recommended to address customer needs and mitigate health score decline:

Accelerate the Azure Health Event to formally assess and close resiliency gaps across business-critical workloads

Address critical health recommendations to proactively reduce high-severity case drivers and recurring escalations

CS Workspace

- Home
- Portfolio Dashboard
- Agent Feed

RECENT CHATS

- Prepare for my customer ...
- Initiate Health Success Pro...
- Show me the Contoso Heal...
- Show me health recommen...
- Show me the Contoso Succ...

Show 6 more

Agent

Prepare for my customer stakeholder meeting for Contoso Holdings

View Customer Strategic Priorities

AGENT

Here is the Customer Satisfaction overview for **Contoso**. The dashboard shows CSAT metrics, trends, distribution of scores, and key feedback themes — both areas of improvement and positive signals.

Agent

I've prepared the executive summary for your stakeholder meeting with Contoso Holdings.

See Proactive Deliveries Customer Satisfaction for Contoso

Customer Satisfaction

Healthcare • \$8.5M ARR

Customer detail

PREVIEW

SURVEYS RETURNED

4119

% VSAT

64%

% DSAT

14%

CONTACTABILITY YTD**

100%

% CTL

0.4%

CSAT BY SURVEY TYPE

100%
75%
50%
25%
0%

Proactive Deliveries Support

● % DSAT ● % SSAT ● % VSAT

CSAT TREND

1000
750
500
250
0

80%
60%
40%
20%
0%

FY26-03 FY26-05 FY26-07 FY26-09

■ # Surveys Returned ● % VSAT MTD ● % VSAT YTD

DISTRIBUTION OF SCORES

Very Satisfied	2.6K
Somewhat Satisfied	0.7K
Very Dissatisfied	0.3K
Somewhat Dissatisfied	0.3K
Neutral	0.2K

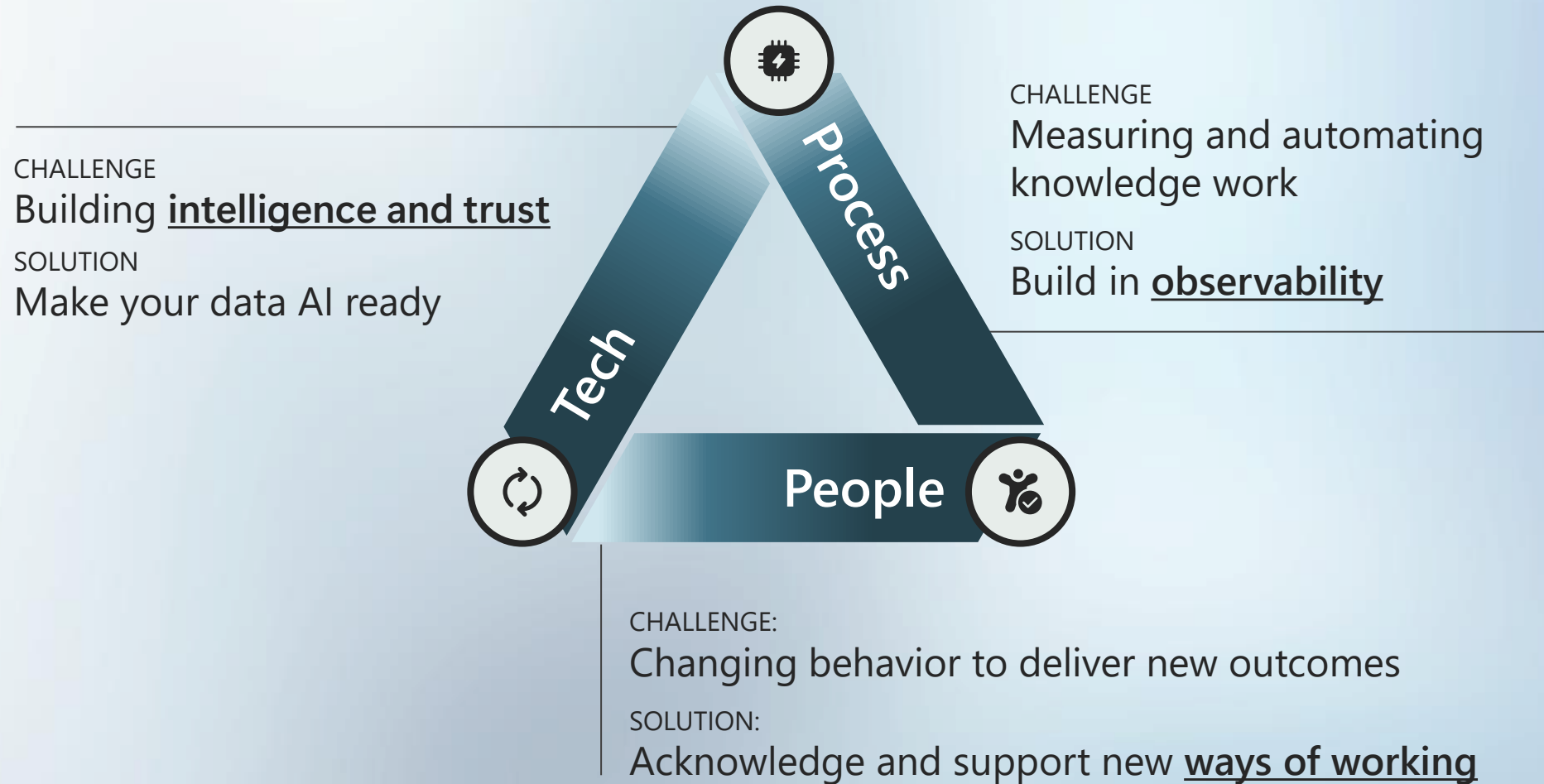
WHAT COULD BE IMPROVED THEMES

Reactive Support	30.3%
Others	28.24%

WHAT IS GOING WELL THEMES

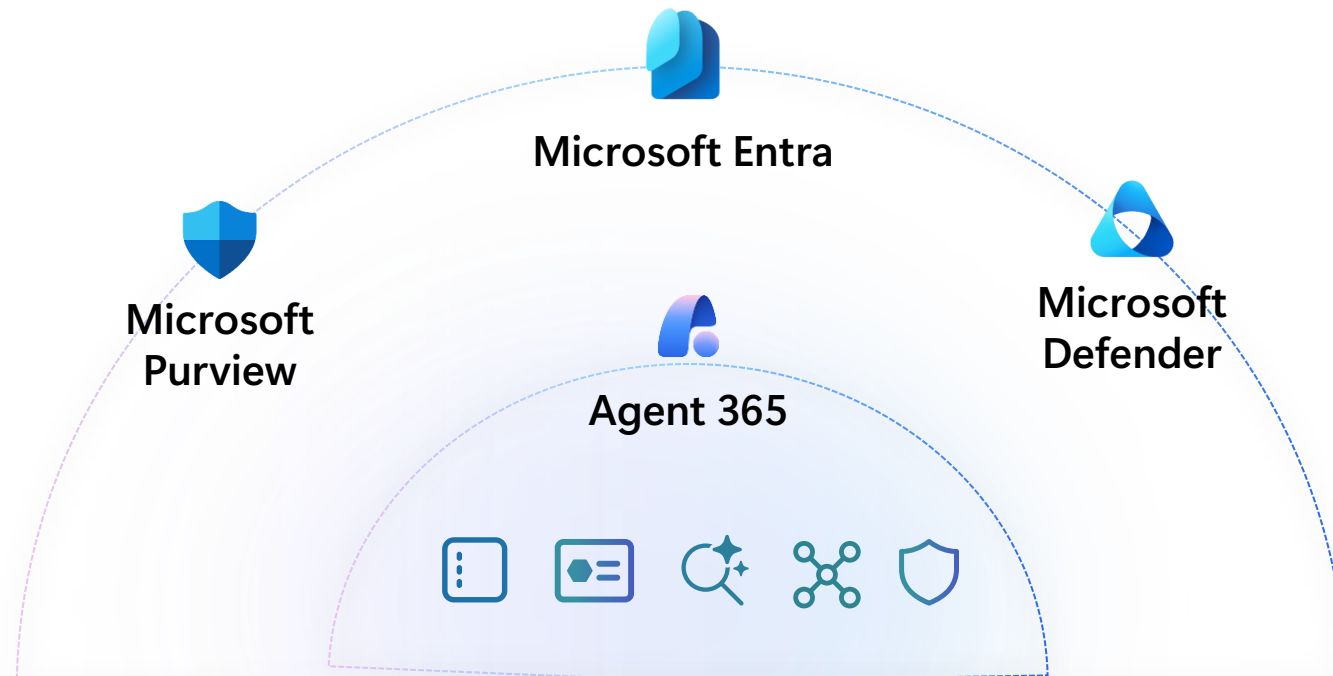
Positive Staff Sentim...	51.61%
Resource Expertise	47.55%

Overcoming challenges to transformation



Manage & Secure your agents

Enterprise-grade security and
governance—built in



Observe

Gain visibility into agents in your environment, understand how they're used, and act quickly on performance, behavior, and risk signals before they impact the business.

Microsoft 365 admin center

Home > All agents

All agents

Monitor and manage agents powered by Microsoft Entra in your organization. [Manage in Entra ID](#) | [Learn more about managing agents](#)

Map Registry Requests Catalog

Total agents: **21,762** | Agents at risk: **4** | Ownerless agents: **8** | Blocked agents: **23**

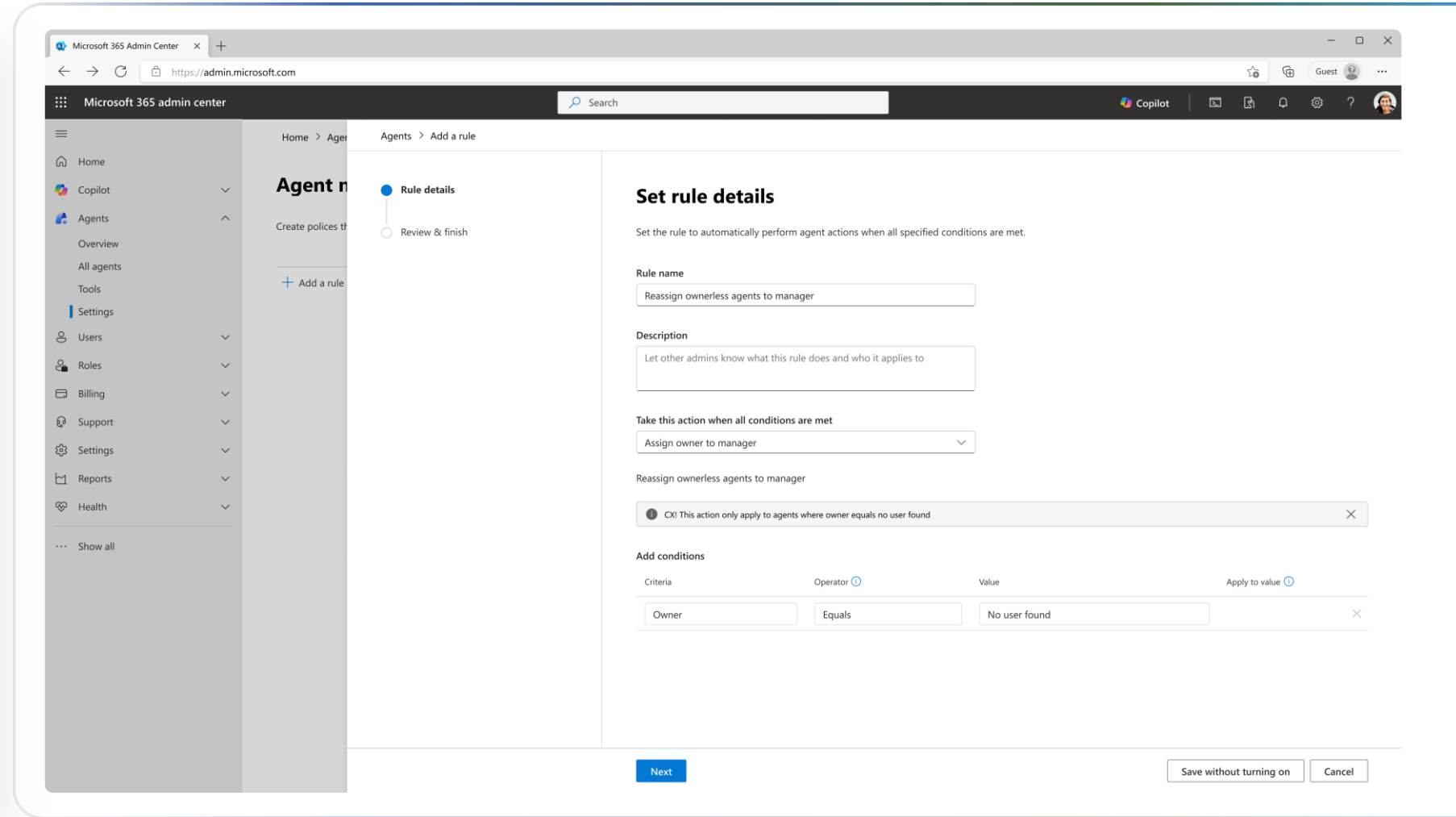
Upload agent | Export to Excel | Pin for users | 21,762 items | Choose columns | Search

Filters: Publisher Availability Channel Platform Acquired from

<input type="checkbox"/>	Name	Availability	Risks	Active users (30 days)	Total sessions (30 days)	Exception rate (30 days)	Assisted hours (30 days)	Last updated
<input type="checkbox"/>	Zava Fabric Supplier Foundry	All users	0	642	3,056	10%	2,543	Mar 1, 2026
<input type="checkbox"/>	Finance Data Analysis Foundry	All users	0	746	2,945	12%	3,598	Mar 1, 2026
<input type="checkbox"/>	Zava Supplier Agent Copilot Studio - Lite	Some users	1 alert	956	3,600	10%	52	Mar 1, 2026
<input type="checkbox"/>	Customer Billing Agent Cuopilot Studio - Full	Some users	2 alerts	1,203	2,563	5%	945	Mar 3, 2026
<input type="checkbox"/>	Researcher Microsoft	Some users	0	15	1,299	2%	200	Mar 4, 2026
<input type="checkbox"/>	Genspark Genspark	Not activated	0	—	—	—	—	Mar 4, 2026
<input type="checkbox"/>	Manus Manus Inc.	Some users	0	104	1,090	4%	1,798	Mar 7, 2026
<input type="checkbox"/>	n8n Published by your org	All users	0	391	3,295	2%	963	Mar 7, 2026

Govern

Establish guardrails for agents and people, onboard agents with IT oversight, and govern agent access to resources and data. Be audit ready with built-in compliance and data retention.



Secure

Secure agent identities, control access to resources, prevent data oversharing and leaks, and defend against threats and vulnerabilities with enterprise-grade security solutions.

The screenshot displays the Microsoft Defender AI Agents console. The main view is for the 'Customer Billing Agent' (Agent 365), which is covered by Copilot Studio and created by John Harrington. The 'Incidents and alerts' section shows a table of incidents with the following data:

Incident name	Incident ID	Priority score	Severity	Assigned to
Collection incident involving one user	2356358	93	Critical	Unassigned
Persistent Jailbreak Attempts on Copilot AI A...		96		Unassigned
AI agent tool invocation blocked by Microso...		90		Unassigned
Multi-stage incident involving initial access & Co...	1134731	84	Medium	#Phishing_Triage_Agent_id
Multi-stage incident involving Execution & Later...	2356377	56	Low	Unassigned
Jailbreak Attempt in a Copilot Studio Agent...		44		Unassigned
Compromised user account identified throu...		43		Unassigned
AI Agent Tool Invocation Blocked by Microsoft D...	23575642	22	Informational	#Phishing_Triage_Agent_id
AI agent tool invocation blocked by Microso...		22		#Phishing_Triage_Agent_id

The right-hand pane provides details for the selected incident: 'Collection incident involving one user'. It is classified as High priority, Active, Unassigned, and Unclassified. The priority assessment is 93, indicating it is a top priority. The incident details show it is assigned to 'Unassigned' with ID 2356358. The first activity occurred on Feb 25, 2026 at 2:41 AM. The incident description states: 'Microsoft Defender blocked a tool invocation attempt initiated by the AI agent. Error message: Tool invocation is blocked by Suspicious tool usage detection. Tool name: Send-an-email--V2-Agent...'. Recommended actions and automated investigation options are also visible.



Microsoft Agent 365

The control plane for agents

Observe

Monitor and manage agents in real time

- **Registry:** Register and track every agent
- **Mapping:** Visualize agent usage and behavior
- **Analytics:** Measure agent adoption, performance, and ROI
- **Role-specific oversight:** Extend agent visibility to security and business leaders

Govern

Govern agents throughout their lifecycle

- **Onboarding:** Bring agents under control from day one
- **Integration management:** Control what agents can access and do
- **Lifecycle management:** Automate agent lifecycle policies
- **Audit and logging:** Strengthen traceability and be audit ready
- **Data compliance:** Meet AI regulations and policies

Secure

Protect all agents comprehensively

- **Access control:** Protect agent identities and access
- **Data security:** Prevent oversharing and data leaks
- **Threat protection:** Defend against threats and vulnerabilities

Thank you

