

# AI Agent Discovery Questionnaire

For prospects evaluating Microsoft Copilot Studio agent services with SOPIQ.

PREPARED FOR

DATE

## Answer what you can.

This questionnaire helps SOPIQ understand your goals, environment, and requirements so we can scope, build, and deploy Microsoft Copilot Studio agents tailored to your organization. Anything left blank, we will work through together during the discovery call.

## 1 Organization & Primary Contacts

Organization name

Industry / sector

Primary contact (name, title)

Email / phone

Technical contact (if different)

Approx. number of employees

## 2 Microsoft Environment

*Determines which portals, features, and compliance posture apply.*

Which Microsoft cloud is your tenant in?

- Commercial (.com)       GCC       GCC High (.us)  
 DoD       Not sure

Current Microsoft 365 plan(s):

- Business Standard       Business Premium       E3 / G3  
 E5 / G5       Other / Not sure

M365 Copilot license? (Yes / No / how many)

Active Azure subscription? (Yes / No / owner)

### 3 Compliance & Data Sensitivity

*Drives tenancy, data residency, and deployment model.*

**Which apply to the data the agent will touch? (check all)**

- |   |                                      |   |  |
|---|--------------------------------------|---|--|
| <input type="checkbox"/> CUI              | <input type="checkbox"/> ITAR / EAR  | <input type="checkbox"/> CMMC           | <input type="checkbox"/> HIPAA / PHI   |
| <input type="checkbox"/> PCI / cardholder | <input type="checkbox"/> GDPR / CCPA | <input type="checkbox"/> FTI / IRS 1075 | <input type="checkbox"/> None / Public |

**Any data residency or sovereignty requirements?**

**Existing DLP / governance policies to align to?**



### 4 Use Cases & Goals

**What problem(s) should the agent solve?**

**Who are the intended users? (employees / customers / partners)**

**What does success look like in 90 days?**

**Is the agent primarily:**

- Internal / employee-facing
  External / customer-facing
  Both

### 5 Delivery Channels

*Where will people interact with the agent? External channels always consume credits.*

**Select all that apply:**

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Microsoft Teams     | <input type="checkbox"/> SharePoint     | <input type="checkbox"/> Public website |
| <input type="checkbox"/> Mobile / custom app | <input type="checkbox"/> WhatsApp / SMS | <input type="checkbox"/> Other          |

### 6 Data Sources & Integrations

**What knowledge sources should ground the agent? (SharePoint, files, Dataverse, websites, etc.)**

What systems must it read from or write to? (CRM, ERP, ticketing, line-of-business apps)

Any APIs, custom connectors, or on-prem systems involved?

Will the agent likely need premium connectors or custom HTTP actions?

- Yes
- No
- Not sure

## 7 Volume & Scale

*Feeds the consumption / cost estimate. Best guess is fine.*

Estimated interactions per day

Number of distinct agents envisioned

Expected peak periods or seasonality

Typical complexity (FAQ / Q&A / actions / reasoning)

## 8 People & Ownership

Who will build / maintain agents on your side, if anyone?

Who approves go-live?

Who owns the Microsoft 365 / Azure administration?

## 9 Billing Preference

*How would you prefer to pay for agent usage (Copilot Credits)?*

Select one:

- On our own Azure subscription (we pay Microsoft directly)
- Through SOPIQ (single managed invoice)
- No preference / advise us

**10** **Timeline & Priorities**

Target start date

Any hard deadlines or events driving this?

Budget range or constraints (optional)

Anything else we should know?

**Thank you.**

Save this PDF and email it to [info@sopiq.com](mailto:info@sopiq.com). We will follow up with a tailored scope and consumption estimate within one business day.