

RESEARCH **Advanced** 60 MIN · UPDATED 2026-09-30

Build a market research assistant agent.

Stand up an agent that synthesizes internal and external data sources to surface market trends and the competitive landscape on demand.

MICROSOFT 365

SharePoint

WORKS WITH

Copilot Studio

Business Outcome

On-demand market context for planning decisions, instead of a one-off research project every time a question comes up.

Workflow Steps

Step 1: Connect internal and external sources

SharePoint

In Copilot Studio's Knowledge settings, add the SharePoint libraries holding internal market research, purchased analyst reports, and win/loss notes, plus a web-search connector if your license supports grounding on external sources.

The whole value of this agent is synthesizing across both, so an agent scoped to only one side is just a search box with extra steps.

Step 2: Ask it a real planning question

Copilot Studio

Test it with the kind of question that actually comes up in planning cycles, not a generic "tell me about the market" prompt.

PROMPT

What's the current competitive landscape in mid-market ERP, and how has it shifted in the last two quarters? Pull from our internal win/loss notes and any analyst reports in the library.

Step 3: Check that internal and external findings actually reconcile

Copilot Studio

When internal win/loss notes paint a different picture than an external analyst report, ask the agent directly which sources support each view — a response that quietly favors one source without flagging the disagreement is hiding a decision-relevant signal rather than resolving it.

Step 4: Use it as a standing resource, not a one-off

SharePoint

The real value shows up when planning teams can query it repeatedly through a cycle instead of commissioning a fresh report each time.

✓ Check the work

- Check that internal and external sources are both actually being drawn from, not just one.
- Flag and investigate any place internal and external data disagree, rather than letting the agent silently pick one.
- Confirm the sources feeding the agent are being refreshed, not going stale.

Expected Outcome

A working agent that returns a synthesized market and competitive landscape summary from a plain-language question.



Want help rolling this out across your team? **Go to Liminals.Tech** 