



Copilot Studio & AI Agent Implementation

Service Definition Document
G-Cloud 15

Status: Definitive
Security Commercial – In Confidence
Version no.1/0

THINKING
BEYOND
LIMITATIONS

We're Kainos

Formed in 1986, we set about finding the best people to tackle the most difficult digital work. We fostered a culture where people truly care for each other and the world around them.

Our reputation for software engineering and problem-solving was quickly established, and our customers started to view us more as their colleagues

We're much bigger now, helping organisations across the globe to navigate change in more ways than ever. But some things never change, like our commitment to our people, delighting our customers, and our technical ability

Some say we're leading a quiet revolution in digital, but if you ask us, we're just doing our bit to make the world a little bit better.



3,132 amazing
people



13 consecutive
years of growth



40 years
of innovation



£382m revenue
(FY2024)



13 locations
globally



FTSE 250 listed
tech company



Our core expertise

The digital revolution is already happening. We're leading from the front to help our clients **seize every digital opportunity** and be future-ready.



Cloud



Business Applications



Data and AI



Managed services



Engineering



Service and
experience design



Workday services
and products

- Test
- Audit
- Shield
- Deployment
- Optimisation
- Spark & Grow

Copilot Studio & AI Agent Implementation

Implementation service to design, configure and deploy AI Agents using Microsoft Copilot Studio. The service includes discovery, solution definition, governance alignment, agent development, testing and deployment. Organisations gain fully operational AI agents tailored to business processes, supported by appropriate governance and controls.

Features

1. Discovery of AI agent requirements across business areas and processes
2. Define conversational flows, intents, topics, actions and behaviours
3. Configure Copilot Studio environments, connectors and governance settings
4. Build AI Agents with custom logic, workflows and integrations
5. Implement secure authentication and data-access models
6. Test agent behaviour, responses and safeguard compliance controls
7. Deploy agents across Dynamics, Power Platform, Teams or websites
8. Monitor usage, telemetry and performance for optimisation
9. Provide training for administrators and super users
10. Produce documentation and handover for ongoing agent management

Benefits

1. Automate routine tasks and reduce operational workload via AI agents
2. Improve customer and employee experience through consistent responses
3. Rapid deployment using low-code AI agent creation tools
4. Secure integration with organisational data and Microsoft services
5. Increase process efficiency with automated actions and workflows
6. Improve scalability of frontline and support functions
7. Reduce dependency on manual intervention and service teams
8. Establish governance and control for enterprise AI usage
9. Accelerate adoption of Microsoft Copilot capabilities
10. Enable ongoing internal expansion of AI-driven automation

Copilot Studio & AI Agent Implementation

The Copilot Studio & AI Agent Implementation service provides organisations with a structured approach to designing, developing and deploying AI agents that automate tasks, answer questions, and integrate with business processes. The service ensures that agents are aligned with organisational requirements, implemented within approved governance structures, and configured to operate securely using Microsoft Copilot Studio and the Power Platform.

The engagement includes discovery, requirements gathering, solution definition, development, testing and deployment activities. It focuses on ensuring that the agents meet functional needs, comply with organisational policies and integrate effectively with data sources, workflows and applications.

Discovery & Requirements Definition

A discovery phase is conducted to understand the objectives and operational requirements for AI agents.

Activities include:

- Identifying the purpose, scope and intended users of the agent
- Reviewing existing processes, workflows and knowledge sources
- Understanding data accessibility, sensitivity and compliance requirements
- Gathering sample queries, tasks and scenarios the agent will support
- Identifying integration points with Dynamics 365, Power Platform, Teams or external systems
- Reviewing environment, licensing, and capacity requirements

The output includes a clear definition of agent scope, functional requirements, and design considerations.

Agent Design & Conversation Modelling

Following discovery, a detailed design is prepared for the AI agent. This includes:

- Structuring topics, triggers, actions and conversational flows
- Defining guardrails, fallback behaviours and escalation logic
- Mapping agent tasks, workflows and automated actions
- Identifying required connectors, APIs or external data sources
- Defining prompt rules and response patterns to ensure accuracy
- Ensuring alignment with organisational governance and Responsible AI principles

A design specification is produced, outlining how the agent will operate and interact with users and systems.

Service overview

AI Agent Development

The AI agent is developed using Copilot Studio and related Power Platform components. Development activities include:

- Creating topics, flows, actions and conversation logic
- Implementing automation via Power Automate where required
- Configuring integrations with Dataverse, Microsoft services or external systems
- Implementing fallback mechanisms, routing rules and escalation behaviours
- Adding content sources such as knowledge bases, data sheets or existing documentation
- Applying safety filters and controls for responsible agent behaviour

The agent is iteratively developed and reviewed to ensure it meets the defined specification.

Testing & Quality Assurance

A structured testing phase ensures the agent is accurate, reliable and compliant. This includes:

- Functional testing of conversational flows and logic
- Validation of data access and permissions
- Testing integrations and automated actions
- Reviewing edge cases, error handling and failure scenarios
- Ensuring responses align with organisational standards and tone of voice
- User acceptance testing with stakeholder groups

Testing outputs are used to refine the agent and ensure it performs as

intended.

Deployment & User Enablement

Once testing is complete, the agent is deployed into the agreed production environment and made available to users. Activities include:

- Deploying to selected channels (Teams, websites, Dynamics 365, Power Apps etc.)
- Verifying permissions and access configurations
- Providing training for administrators, super users and key stakeholders
- Documenting operational procedures and handover materials
- Supporting early usage and recording feedback for optimisation

Deployment includes coordination with relevant teams to ensure a smooth introduction.

Monitoring & Optimisation Planning

To support ongoing improvement, telemetry and performance data are reviewed. Activities include:

- Reviewing agent usage, failure points and conversation analytics
- Identifying opportunities for expanding topic coverage
- Determining improvements to data sources or workflows
- Providing recommendations for future enhancement phases

This ensures the organisation has a clear path for continued optimisation.

Deliverables

- Requirements and discovery summary
- Agent design specification
- Environment and governance configuration recommendations
- AI agent implemented in Copilot Studio
- Integration and workflow configuration (where applicable)
- Testing documentation and acceptance outputs
- Deployment and channel configuration
- Administrator and super user training
- Operational handover documentation
- Recommendations for ongoing improvement

Methodology

The methodology for this service consists of structured phases that ensure consistency and quality throughout implementation:

Phase 1: Mobilisation

Kick-off session, stakeholder confirmation and planning.

Phase 2: Discovery & Requirements Gathering

Capture functional, data, security and integration requirements.

Phase 3: Agent Design

Define conversation flows, logic, tasks and architecture.

Phase 4: Environment Preparation

Validate and configure governance, roles and technical prerequisites.

Phase 5: Development

Build topics, actions, automations and integrations.

Phase 6: Testing

Perform functional, non-functional and user acceptance testing.

Phase 7: Deployment

Move solution to production and configure user access.

Phase 8: Handover & Recommendations

Provide documentation, training and improvement guidance.

Roles & Responsibilities

Supplier Team

- AI Agent Developer
- Power Platform Architect
- Governance & Compliance Specialist
- Business Analyst

Customer Team

- Product Owner
- IT Administrator
- Data & Security Representatives
- Subject Matter Experts

Estimated Duration

Typically **3–6 weeks**, depending on the complexity of the agent and integration requirements.



Where we are

The Americas

Buenos Aires
Indianapolis
Nova Scotia
Toronto

UK and Ireland

London
Birmingham
Belfast
Derry
Dublin

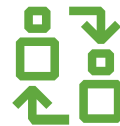
Central Europe

Gdansk
Helsinki
Paris
Wommelgem

What makes us stand out



Our people



True collaboration



Innovation



Digital know-how



Common goals



Trust



Digital Services

We are **engineers**, specialists. We **overcome big challenges** for our clients, through delivery of **intelligent** digital services that use the best in **talent and technology**.



55 million UK citizens

positively impacted by
services we've delivered



**892
customers**



13 locations

And growing



99% of customers

rate our service as good,
great or excellent



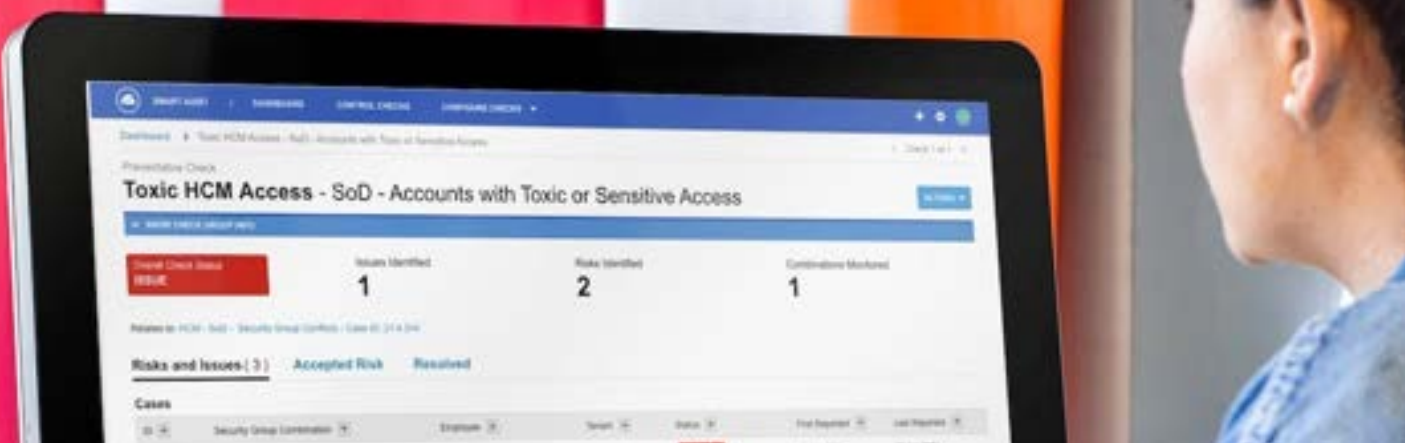
Key partners

Working closely with
Microsoft and AWS to
deliver results



Award-winning

90+ industry awards



Workday

Kainos is a Workday **phase one prime status partner** in all European, North American and Asia Pacific markets. We have worked with many public and private sector customers of various sizes and scale in over **40 countries worldwide**.



Partner Since 2011

We are the only certified Workday Services, Technology and Extend partner globally.



Workday Services

Full range provider from pre-deployment consulting, implementation and support.



650+ Customers

We have deployed to over 650 customers and are a proud Workday customer also, using HCM, Financials, Recruitment, Planning and PSA to run our business.



Workday Public Sector

We have worked with many UK Public Sector customers with their initial deployment, post-deployment support and adoption of new modules.



Kainos Smart

Our product is deployed to 500+ customers globally saving them 1000s of testing hours.



900+ Consultants

Hold over 2,700+ Workday certifications covering all areas of the platform.

65 million

citizens positively impacted
by services **built by Kainos**
for the UK Government



Every driver & every car on the road
Every piece of work to fix roads
Every court case & every prisoner
Every home helped with help-to-buy
Every passport & renewal application
Every COVID test sent out
Every COVID test result
Every user of the NHS App

Every voter registered
Every company opened & closed
Every UK civil servant trained
Every piece of produce grown in the UK
Every thing imported & exported to the EU
Every benefit fraud prevented
Every body's pension details

Our Social Values and commitment to HM Government strategy



Education & Capability Building

We empower people through technical and behavioral learning programs, academies, and outreach projects, fostering skills development and inspiring future technology leaders across communities and organisations.

Social Responsibility

Tackling workforce inequality and ensuring equal access to technical and vocational education, through our Academies, Camps and Earn as you Learn schemes.

Innovation & Future Readiness

Driving continuous improvement through technology

Health, Wellbeing & Accessibility

We support colleagues' physical, emotional, and career wellbeing through initiatives, guidance, and inclusive design, ensuring equal access, experiences, and compliance for all users with diverse needs.

Climate Action & Sustainability

With a comprehensive sustainability strategy underway, we will be a Carbon Net Zero company by 2030.

Equality, Diversity & Inclusion

Maximising service experience for citizens and civil servants by delivering projects with diverse teams, underpinned by our BAME, LGBTQIA+ and female communities.



The Code of Ethics

We are guided by our 6 ethical principles.



Wellbeing

We protect the wellbeing of our staff, customers and communities.



Equality

We improve access and inclusion and minimise bias.



Transparency

Our decisions are traceable and accountable.



Integrity

We hold ourselves and others to ethical standards.



Environment

We act responsibly towards the Earth and its resources.



Initiative

We take initiative to deliver social value and positive impacts.

BCDR and Exit Plan

Business Continuity and Disaster Recovery (BCDR)

A Business Continuity Plan can be provided if required. This shall set out the arrangements to be invoked in the event of an actual or perceived threat to business continuity, to ensure continued operation of the system and continuity of the services provided by Kainos pursuant to the Prime Agreement and shall include: the alternative processes, options and responsibilities that may be adopted in the event of a failure or disruption to the system and/or services provided by Kainos pursuant to the Prime Agreement; and the steps to be taken by Kainos upon resumption of the system and services provided by Kainos pursuant to the Prime Agreement in order to address any prevailing effect of the failure or disruption including a root cause analysis of the failure or disruption.

Exit Plan

An Exit Plan can be provided if required to detail the steps that would be carried out to ensure smooth transition of Kainos services to a new supplier. The steps outlined in the Exit Plan will help mitigate against any disruption to the service during the transition period. It is assumed that any new supplier will themselves have a procedure they wish to follow during the transition period, and as such the steps in this Exit Plan will serve as a checklist for the new supplier to ensure all key areas of the transition have been covered. The Exit Plan will therefore be subject to refinement should it be exercised.

Commercial Statement

Confidentiality and copyright

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All information provided prior to execution of a contract is provided 'as is' and 'subject to contract' without warranty of any kind.

This document does not constitute an offer from Kainos. In the event that the parties elect to work together, they will only be contractually bound to each other upon signature of a contract.

Corporate information

"Kainos" is the trading name of the Kainos group of companies, further information on which can be found here: <https://www.kainos.com/corporate-information/>.

Kainos Software Limited/ Kainos WorkSmart Limited, will be the contracting entity under this tender / for the provision of the service and may be assisted from time to time by other Kainos group companies.

Freedom of information

Kainos considers that the following information provided in this document is exempt from disclosure under the Freedom of Information Act 2000 (FOI):

The CVs of staff qualify under the "Personal Information Exemption (s.40)" of the Freedom of Information Act and are exempt from disclosure under the Data Protection Act 1998. The Period for which this information should be confidential is the lifetime of the Data Subject.

Rate and pricing information is confidential and commercially sensitive and covered by the 'Commercial Interests' exemption (s.43) of the FOI, as the release of this information is likely to prejudice the commercial interests of Kainos and is likely to adversely affect its (and the Customer's) future negotiating position. The period that this information should be confidential for should be 5 years.