

CASE STUDY · TECHNICAL EDITION

A proposal agent that runs inside Microsoft 365 Copilot, governed like any other app in the tenant.

How Strong Tide AI built CloudSAFE's proposal-to-SOW agent as Anthropic Cowork skills on Copilot — deterministic guardrails, SharePoint as the source of truth, and a deployment model IT already knows.

CLIENT

CloudSAFE, a managed services provider built from seven acquired companies, with a partner-driven sales model.

PLATFORM

Microsoft 365 Copilot — Anthropic Cowork (agentic mode), deployed as an M365 app package. Salesforce CPQ and SharePoint stay systems of record.

FOCUS

The architecture, guardrails, validation, and tenant governance behind the agent.

01 The problem, briefly

Salesforce CPQ holds 200+ products and prices them well, but it doesn't produce the narrative document a customer signs. CloudSAFE's contract standards — the RACI, service terms, DR language — were solid but lived in documents, so every rep reassembled them by hand, per deal. The standard existed; there was no system running it.

02 The architecture

The design principle: **every system keeps its job**. The agent orchestrates; it doesn't become a new source of truth.

Salesforce CPQ	Only source of pricing, SKUs, quantities, and licensed products.
SharePoint	Only source of contract terms and SOW templates — read live through the Microsoft 365 connector, so edits propagate without a rebuild.
Teams / rep notes	Deal context and narrative. Meeting recordings and transcripts, optional.
Anthropic Cowork	Orchestration and assembly — runs on Copilot; two Claude-powered skills, shipped as one plugin.

03 Two skills, one hard gate

The workflow ships as two deliberately separate skills — different triggers, different inputs, and a gate between them so contract paper is never generated before the customer approves.

SKILL ONE · CLOUDSAFE-PROPOSAL

CPQ quote → branded proposal

Reads the CPQ export plus notes and transcripts; produces a print PDF and a native, editable PowerPoint deck.

SKILL TWO · CLOUDSAFE-SOW

Approved proposal → SOW or Change Order

Confirms the deal is finalized, maps to the right template by product line, pulls current language from SharePoint, and ships a change log with every run.

The rep stays in the loop. The skill recommends the instrument — a Change Order for an add, a SOW for net-new — but the rep decides. Nothing auto-sends; every output is a draft a human approves.

THE PIPELINE, END TO END



“ Strong Tide didn't sell us a tool. They understood the work first, helped us set the standard, and in two weeks built us an AI agent that produces proposals my reps are glad to use. That's rare.

Doug McMaster CEO, CloudSAFE

THE DEEP DIVE

Deterministic where it matters, governed like Microsoft software.

04 Guardrails, not vibes

The judgment lives in the skills, not in each rep's prompt. The rules that matter are hard constraints, proven on real deals:

- ✓ **Nothing is claimed the customer didn't buy.** Pricing and line items come only from the CPQ; narrative comes only from the rep's notes. With no source for the "why," the proposal stays factual rather than inventing a motive.
- ✓ **Missing data is flagged, never filled in.** A quote with no quote number refuses to render — no "[add number]" covers going out the door.
- ✓ **No invented totals.** No summed contract value, no line-item math the quote doesn't state, and never the full licensed-program suite by default.
- ✓ **Current data beats stale defaults.** When the template library carried an out-of-date hourly rate, the quoted rate won — and the discrepancy was flagged upstream for a one-time fix at the source.
- ✓ **One source, doc equals PDF.** The SOW is built as one branded Word file with the PDF rendered from it, so the editable doc and the PDF never drift.
- ✓ **Every run ships a change log** showing exactly how the paper differs from the template and the quote — items needing a decision highlighted for review.

05 Validated against a baseline

Three real deals — a full IBM Power hosting proposal, an x86 capacity add, and an IBM i storage-add SOW — each run with the skills and without.

WITH THE SKILLS	BASELINE (NO SKILLS)
Passed every check	One run invented a contract total
Correct template by platform, RACI attached	Two produced no editable deck
Minutes per document	~1 hour rebuilding a template by hand
Rep's instrument choice respected	Overrode the rep's explicit request

06 Limits, stated plainly

Partner-deal SOWs stay blocked until the partner-agreement templates are loaded into SharePoint — the skill says so rather than producing paper linked to the wrong MSA. Finished files land in the rep's Cowork workspace with the customer's SharePoint folders created automatically; the rep files them, since direct library writes aren't attempted in this environment. Re-runs version files rather than delete them — SharePoint's own versioning handles overwrites.

07 Deployment IT already knows

The skills ship as a Microsoft 365 app package — the same mechanism as Teams apps — deployed through the M365 Admin Center tenant-wide, or sideloaded to a single pilot user with the Agents Toolkit CLI. No new admin surface to learn.

Governance is standard M365 app governance. Availability is scoped to the sales team; skills are **admin-managed and not rep-editable**. The agent runs under Entra identity inside the tenant, so SharePoint permissions, Purview DLP, and sensitivity labels apply exactly as they do everywhere else. The least-privilege ask for an outside skills admin is the **Copilot Administrator** role — not Global Admin.

Updates are a version bump and a re-upload; users pick up new skills on the next sync without interrupting active conversations. Uninstall is removing the app.

08 What it takes to run

ENVIRONMENT AT A GLANCE

Licensing	Microsoft 365 Copilot licenses; Anthropic Cowork enabled on the tenant (Frontier).
Connector	Microsoft 365 connector for live SharePoint reads; bundled template copies are an offline fallback only.
Configuration	Two SharePoint library locations, set once by an admin: SOW templates and executed agreements.
Rendering	Headless browser (proposal PDF), python-pptx (deck), Node docx (SOW), LibreOffice (SOW PDF) — standard in the Anthropic Cowork runtime.
Maintenance	Edit a template in SharePoint and every rep's next run inherits it. No rebuild, no redeploy.

09 Why this order of operations

Strong Tide's recommendation was to define the proposal standard first, build the agent to run it, and treat any software purchase as a later decision. The result: CloudSAFE walked into its national sales meeting with a working, governed agent in its own tenant — and a defined standard any future tool now has to beat.