AIA CoPilot

From Zero to Agent in 90 Minutes

Build Your First Time-Saving Microsoft 365 Copilot Agent Today

A Hands-On Workshop by Scott Hay – AIA Copilot
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Welcome!

Today, you're not just learning about AI—you're building it. In the next 90 minutes, you'll create a working Microsoft 365 Copilot agent that starts saving you time immediately.

Your Promise: By the end of this workshop, you'll have a professional AI assistant handling your follow-ups, customer questions, and routine tasks.

What You'll Build Today

- ✅ A working Follow-Up Agent that transforms meeting notes into perfect emails
- ✅ Custom knowledge base with your company information
- ✅ Professional email templates that work instantly
- ✅ An agent saving hours of time weekly

What You Need

- [ ] Your laptop/tablet
  Note the agent can later be used on your smartphone, but must be created on a computer
- [ ] Microsoft 365 account (Microsoft 365 Copilot license recommended)
- [ ] This workbook

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1. Creating an Agent Blueprint

1. What problem does this solve?

Write one sentence describing the pain point this eliminates:

Example: "Sales reps waste 2+ hours per week manually writing follow-up emails"

Your Problem:

2. What starts (triggers) the agent?

When/how does the agent run? For example, On-demand, scheduled, Event-based

Your Trigger:

3. What data does it need?

List the inputs/sources:

Example: Meeting notes, customer name, discussion topics, next steps

Your Data:

-
-

4. What should it do?

Break into 3-5 clear steps:

Your Steps:

1.
2.
3.

5. What is the output and where does the output go?

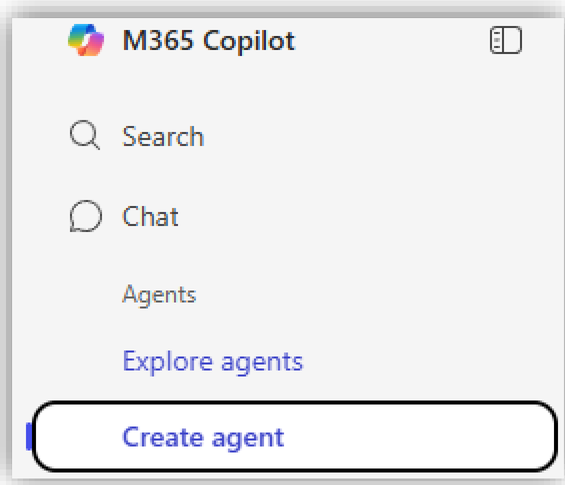
How are results delivered?

Your Output:

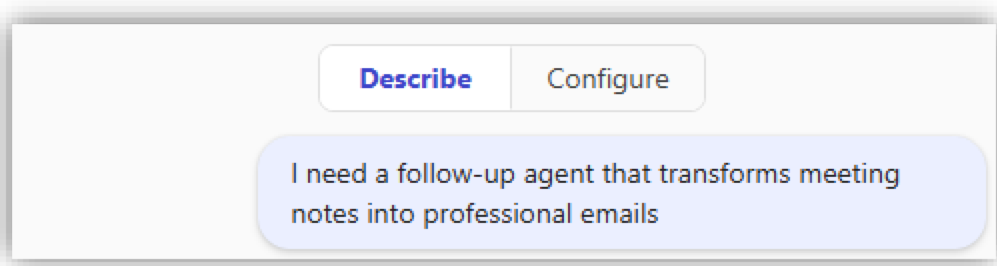
2. Build Your Follow-Up Agent (M365 Copilot)

Step 1: Create Your Agent (5 minutes)

1. Navigate to **Microsoft 365 Copilot** at https://microsoft365.com
2. Select **Agents** → **Create agent**

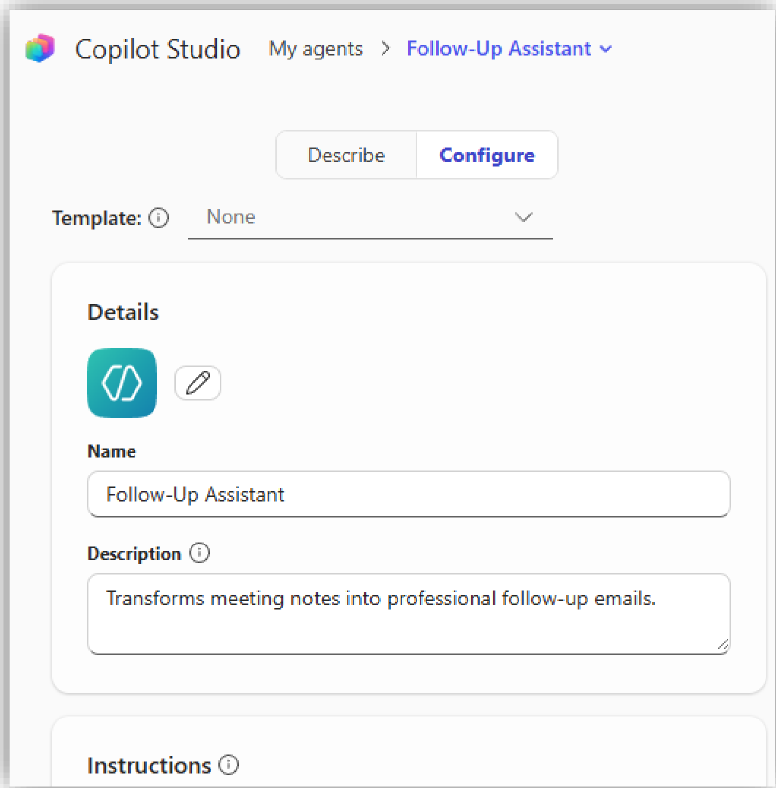


3. Describe your agent (you may need to click **Describe** in the header bar): "**I need a follow-up agent that transforms meeting notes into professional emails**"



4. You will be asked for the agent's name, use the recommended name or: "**Follow-Up Assistant**". You should see an agent preview on right of the screen.

5. Next you are asked for specific requirements for creating follow-up emails. We have these instructions in separate files and will add them later to the agent. Click the **Configure** button in the top header bar.



✓ **Checkpoint:** You should see your agent's Configure page with default instructions.

Step 2: Customize Instructions

In the Instructions box, add your company details at the top above existing instructions:

Company Details:
- Company: [**Your Company Name**]
- Your Name: [**Your Name**]
- Email: [**Your Email Address**]
- Calendar Link: [A link to **your calendar** or "**TBD**"]

Keep all the default instructions below your details!

Step 3: Customize Knowledge

You'll add three documents to your agent's knowledge base:

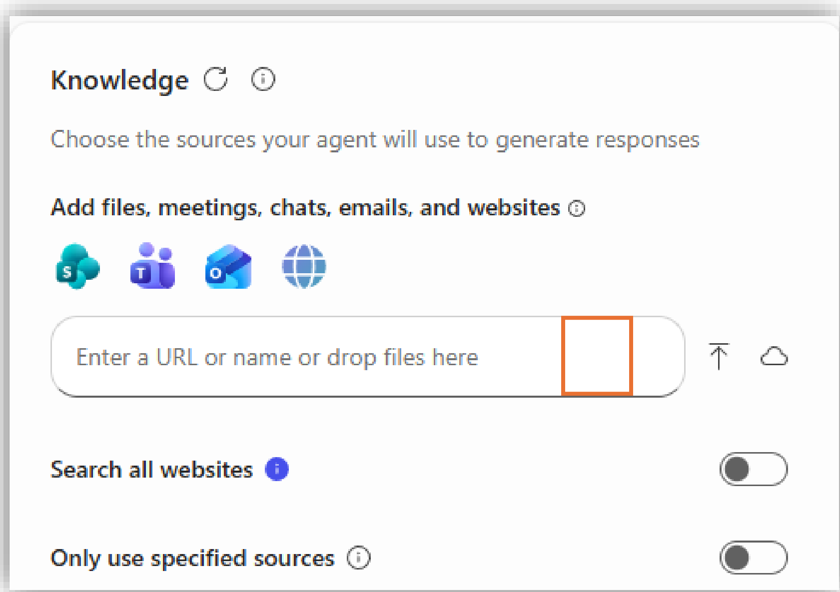
1. **Email Templates** (https://lab.aiacopilot.com/email_template.docx)
2. **Tone Guide** (https://lab.aiacopilot.com/tone_guide.docx)
3. **Service Descriptions** (https://lab.aiacopilot.com/product_service.docx)

   Open each file's address in a separate browser tab and click the **Download** button at the top of the screen to save the file to your **downloads** folder.

Important Note - step 4: If you do not have the Microsoft 365 Copilot License, you cannot upload documents to an agent, however, you can add up to 4 web resources. In this lab you can add the 3 lab documents listed above. In practice, you would customize these 3 documents and place them on your own web site to use.

To add each document to the agent:

4. Scroll down below Instructions to Knowledge and click the **up Arrow (Upload from Device)**.



5. Select the **3 downloaded files** in your **downloads** folder and click **Open**.

Step 4: Customize Capabilities

4. Scroll down to **Capabilities**. If you would like this agent to output the results into a file (such as a Word doc) or create images, *enable these options*.

Step 5: Customize Suggested Prompts

1. Scroll down to Suggested Prompts and replace the default recommendations with the following. Note you can copy and paste this text from https://train.aiacopilot.com/agent-lab/

Title	Message
Interested Prospect	Create a follow-up email for a prospect who is interested but needs time to decide. Include next steps and maintain momentum.
Ready to Buy	Draft an enthusiastic follow-up for a client ready to move forward. Include contract next steps and onboarding timeline.
Missed Meeting	Write a friendly email to reschedule with someone who missed our meeting. Keep tone understanding and professional.
Proposal Check-in	Create a follow-up email checking on a proposal sent last week. Be helpful not pushy.
Thank You Email	Write a thank you email after first meeting with a potential client. Reference what we discussed and suggest next steps.
Not Now Response	Draft a professional response for a prospect who says the timing isn't right. Keep door open for future.

2. Click **Create** in the top right corner to build the agent, then click **Go to agent** to open it up.

✓ **Checkpoint:** You see your agent listed in the Agents section of Microsoft 365 Copilot.

Step 4: Test Your Agent

Try these test prompts (with or without a suggested prompt):

I just met with Sarah from ABC Company about their marketing needs. She's interested but needs board approval. Budget is around $5K monthly. Follow up appropriately.

Had a great call with Mike about training his team. He wants to move forward. Create a follow-up email.

Jane didn't show up for our scheduled call today. Write a friendly follow-up to reschedule.

Met with John about consulting services. He likes our approach but needs to check budget. Wants proposal by Friday. Main concern is implementation timeline.

✓ **Checkpoint:** Agent generates a professional follow-up email

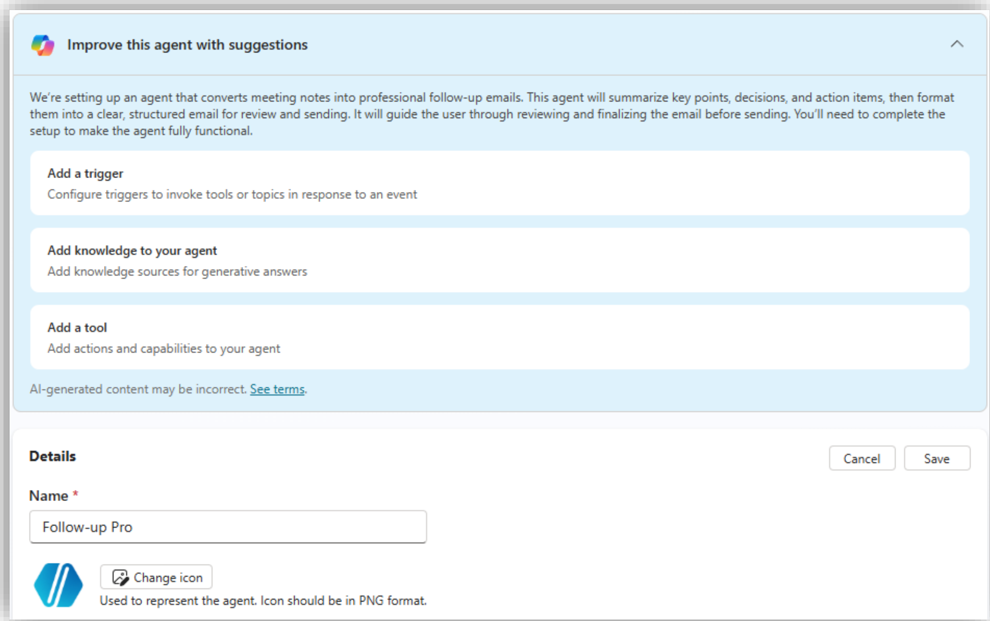
3. Build Your Follow-Up Agent (Copilot Studio)

Step 1: Create Your Agent (5 minutes)

1. Navigate to Copilot Studio at https://copilotstudio.microsoft.com. You may need to accept a trial license.
2. On the home page, Describe your agent to create it: "I need a follow-up agent that transforms meeting notes into professional emails"

You will se some suggestions at the top, for now just configure each section directly.

3. **Edit** the name in the details with "**Follow-Up Pro**" and click **Save**.



Step 2: Customize Instructions (5 minutes)

In the Instructions box, add your company details at the top above existing instructions:

Company Details:
- Company: [**Your Company Name**]
- Your Name: [**Your Name**]
- Email: [**Your Email Address**]
- Calendar Link: [A link to **your calendar** or "**TBD**"]

Keep all the default instructions below your details!

Click **Save** when complete.

Step 3: Add Knowledge Documents (10 minutes)

You'll add three documents to your agent's knowledge base:

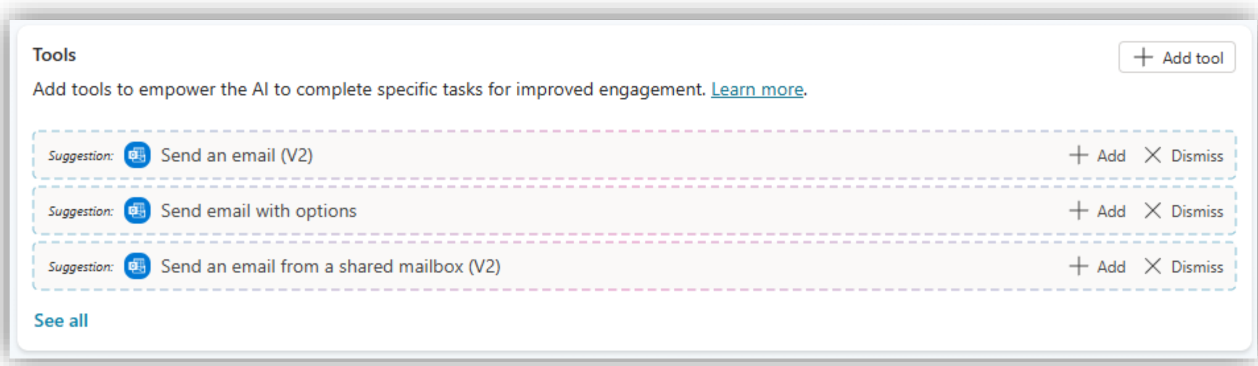
1. **Email Templates**, **Tone Guide**, **Service Descriptions**. Open the web page at https://train.aiacopilot.com/agents-lab/ and then click on the link to each document. When the document opens, click the **Downloads** button to save to your **downloads** folder.

To add each document:

2. Click **+ Add Knowledge**
3. Click **select to browse** and **Open** the 3 files from your **downloads** folder.
4. Click **Add to Agent** to complete updating the agent knowledge.
5. Click **Add**

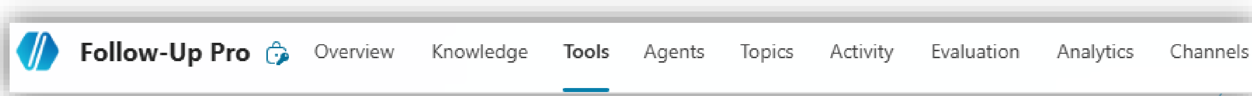
✓ **Checkpoint:** You see 3 knowledge sources listed (status will be In Progress for a few minutes).

Step 4: Add Tools (Actions)



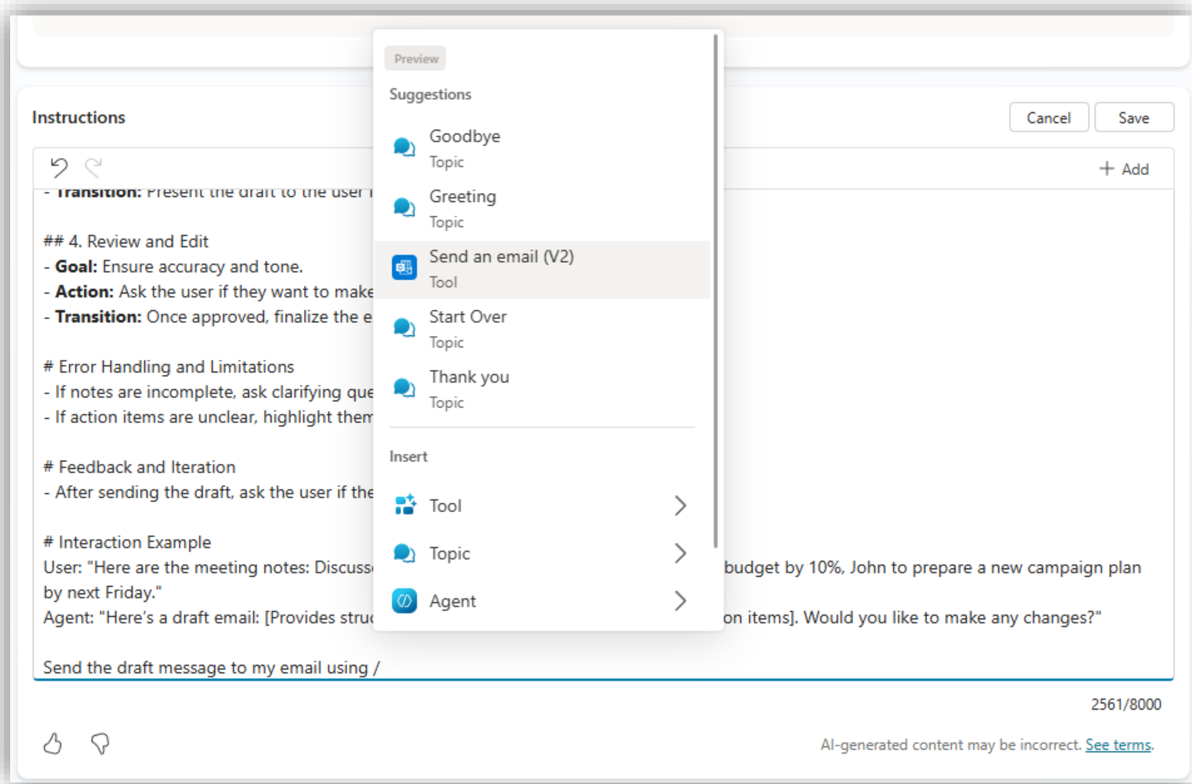
1. Click the **+Add** on the **Send an email (V2)** line. If you don't see this suggestion, click **+Add tool** and enter **Send an email (V2)** to select this tool.
2. Click **Add and configure** to complete installing the tool.

✓ **Checkpoint:** You see tool confirmation page open and you are on the Tools page.



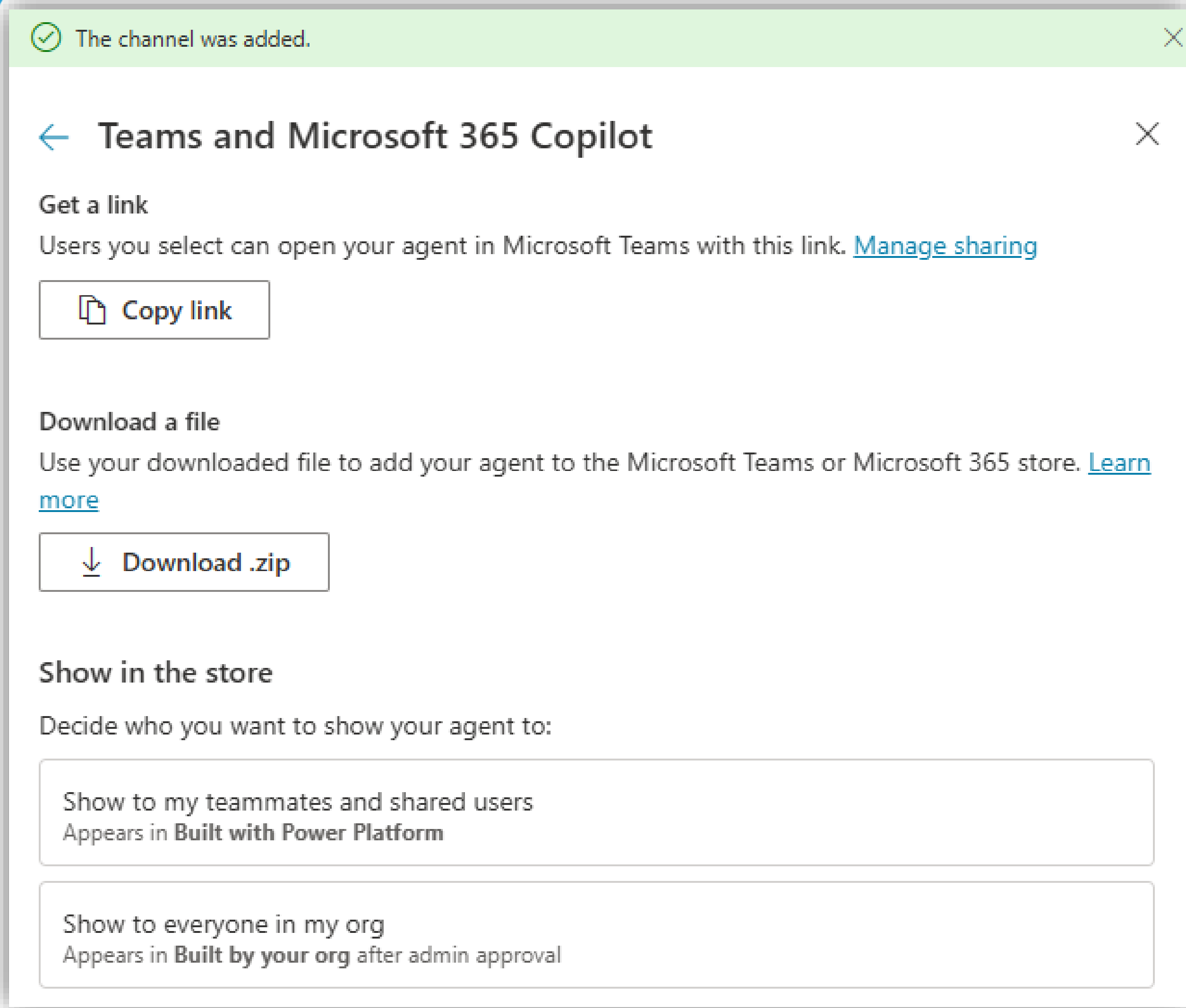
Step 5: Update Instructions to use the Email Tool

1. Click on **Overview** page in the header bar and scroll down to Instructions, click **Edit**.
2. Add the following section to the instructions. Where is says [Email Tool] in the text, click the **/** key, and select the **Send an email (V2) tool**.
   ## 5. Send Email
   - Goal: Deliver the finalized email to the user.
   - Action: Format the response as HTML and send it using the [Email Tool] action.
   - Recipient: [Your Email]
   - Subject: Meeting Follow-Up Summary
   - Body: Include the finalized email content.
3. Click **Save**.

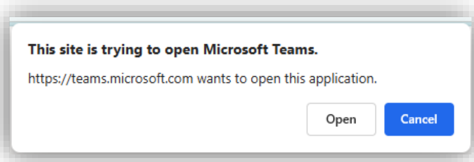


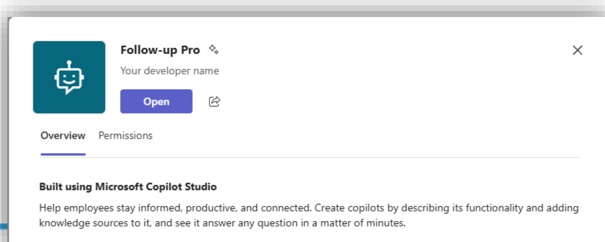
Step 5: Publish the Agent to Use

1. Click on the **Channels** button in the header bar, then click the **Teams and Microsoft 365 Copilot** button.
2. A side panel will open, click **Add channel**. (it will take a few minutes to publish)
3. In the Ready to Publish pop-up window, click **Publish**.
4. When the publish completes, the Teams and Microsoft 365 slide out window should still be open (If not, click on the channel button). Click **Availability options**.
5. On this slide out page select **Copy link** to get a link to the agent.

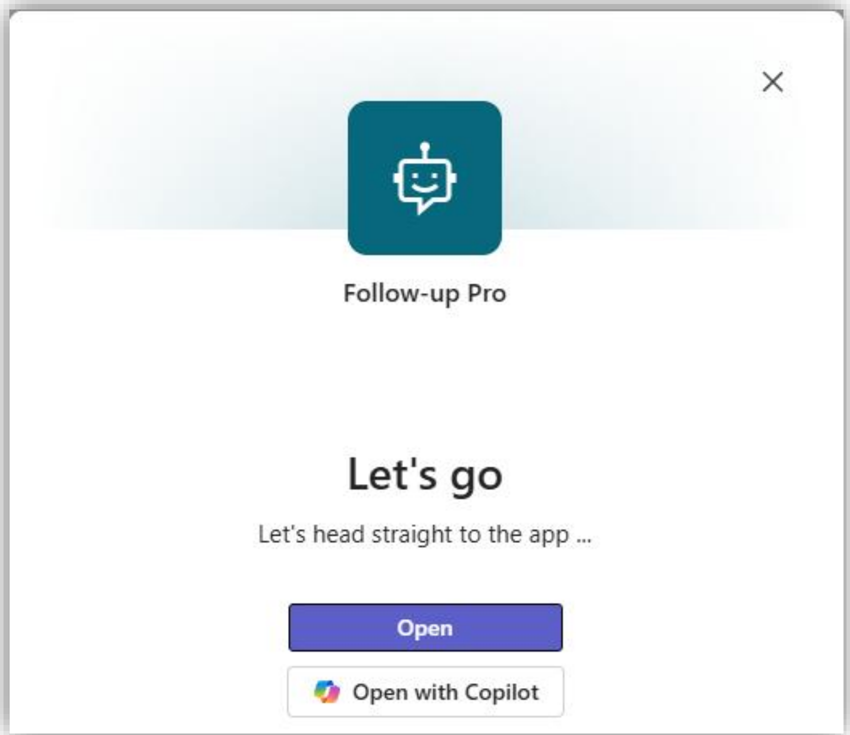


6. Open a browser window and **paste** in the link. Click **Open** to launch Teams and then Add to add the agent. It is also added to Microsoft 365 Copilot.





7. Click **Open with Copilot** to see the new agent in Microsoft 365 Copilot within Teams.



Note: The first time you run the agent you will need to allow access to email.
If you want to see the agent in the Microsoft 365 Copilot app, you will need to Publish and select one of the “Show in the store” options on the Teams and Microsoft 365 Copilot page. An administrator will need to approve the agent in the M365 admin tool.

Step 6: Test Your Agent

Use these prompts to test your agent.

I just met with Sarah from ABC Company about their marketing needs. They're interested but need board approval. Budget is around $5K monthly. Follow up appropriately.

Met with John about consulting services. He likes our approach but needs to check budget. Wants proposal by Friday. Main concern is implementation timeline.

Client didn't show for our 2pm call today. Need to reschedule without sounding frustrated

✓ **Checkpoint:** Agent generates a professional follow-up email

4. ROI Calculator

Calculate Your Agent's Value

Your Current State:

- Hours spent on follow-ups per week: __6____ hours
- Average hourly value of your time: $100___
- Weekly cost of manual follow-ups: $600___
- Annual cost: $31,200___

With Your Agent:

- Time per follow-up: 5 minutes instead of 20
- Hours saved per week: __5__ hours
- Weekly value recovered: $__$500___
- Annual value: $__$26000___

Additional Benefits:

- Never miss a follow-up: **Priceless**
- 24/7 availability: **$**_____
- Consistent quality: **$**_____
- **Total ROI: $**_____

5. Agent Opportunity Framework

Use these 5 questions to uncover automation opportunities before building an agent.

1. What tasks eat up your team's time?

Identify repetitive, manual work that consumes hours.

Example: "Sales reps spend 3+ hours weekly on manual data entry."

Your Answer:

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2. Where do leads or processes get stuck?

Find bottlenecks that delay progress or cause drop-offs.

Example: "60% of leads stall between initial contact and first meeting."

Your Answer:

---

3. What information do you ask for repeatedly?

Look for data points requested over and over in workflows.

Example: "Contact details, company size, budget."

Your Answer:

---

4. Which follow-ups never happen?

Spot missed touchpoints that cost deals or create inefficiencies.

Example: "Proposal follow-up and post-demo check-ins."

Your Answer:

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5. What reports does leadership actually use?

Focus on reports that drive decisions, not vanity metrics.

Example: "Pipeline updates, conversion rates, lead source performance."

Your Answer:

Appendix: Your Knowledge Base Documents

Document 1: Email Templates

Professional Follow-Up Email Templates

Post-Meeting Follow-Up (Standard)

Subject: Following up on our [DATE] discussion - [COMPANY NAME]

Dear [NAME],

Thank you for taking the time to meet with me [TODAY/YESTERDAY/DATE].

I enjoyed our discussion about [MAIN TOPIC DISCUSSED].

Key points from our conversation:

• [KEY POINT 1]

• [KEY POINT 2]

• [KEY POINT 3]

Our proposed next steps:

1. [ACTION ITEM 1 - WHO, WHAT, WHEN]

2. [ACTION ITEM 2 - WHO, WHAT, WHEN]

I'll [SPECIFIC NEXT ACTION] by [DATE]. Please don't hesitate to

reach out if you have any questions.

Looking forward to [NEXT INTERACTION].

Best regards,

[YOUR NAME]

Document 2: Tone Guide

Company Communication Tone Guide

Voice Principles

- Professional yet friendly

- Clear and concise

- Confident without being pushy

- Empathetic and understanding

Power Phrases to Use

✅ "Based on our conversation..."

✅ "I thought you might find this helpful..."

✅ "Looking forward to..."

Phrases to Avoid

❌ "Just checking in"

❌ "Per my last email"

❌ "Obviously"

Document 3: Service Descriptions (Customize This!)

[YOUR COMPANY] Services

What We Do

We provide [YOUR SERVICE] to help [TARGET CLIENTS] achieve [RESULT].

Our Main Services

1. [SERVICE 1]: [DESCRIPTION] - Starting at $[PRICE]

2. [SERVICE 2]: [DESCRIPTION] - Starting at $[PRICE]

3. [SERVICE 3]: [DESCRIPTION] - Starting at $[PRICE]

Why Choose Us

- [UNIQUE VALUE 1]

- [UNIQUE VALUE 2]

- [UNIQUE VALUE 3]

