

# From Zero to Agent in 30 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 OpenAI GPT 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
  - ☐ OpenAI ChatGPT Subscription (for \$20 / month USD)
  - ☐ 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:**

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## 2. What starts (triggers) the agent?

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

**Your Trigger:**

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## 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. 

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2. 

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3. 

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

*How are results delivered?*

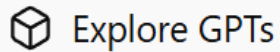
**Your Output:**

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## 2. Build Your Follow-Up GPT

### Step 1: Create Your Agent (5 minutes)

1. Navigate to **ChatGPT** at <https://chatgpt.com>
2. Select **Explore GPTs** on the left side menu

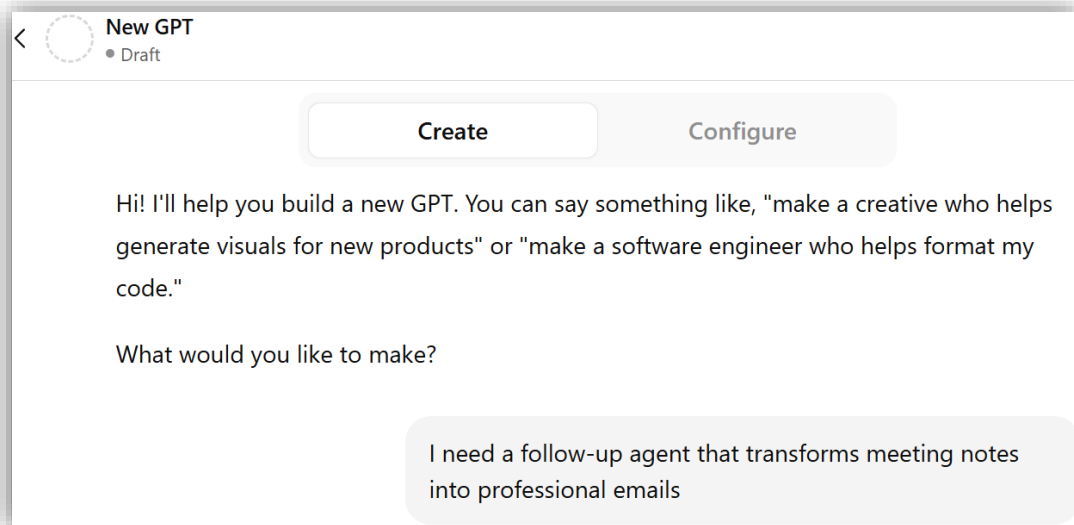


3. Click **+ Create** to get started with a new GPT

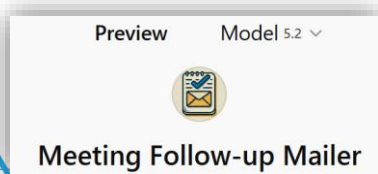


4. Describe your agent (you may need to click **Create** in the header bar):

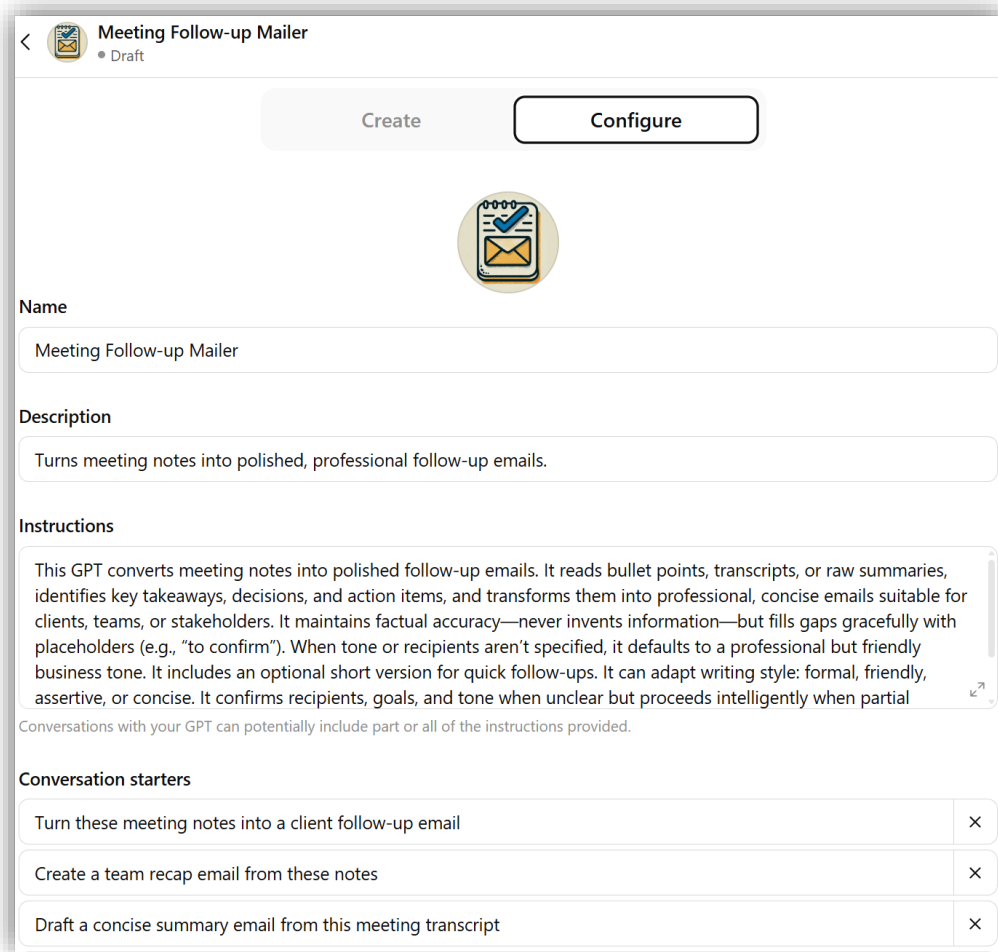
**I need a follow-up agent that transforms meeting notes into professional emails**



5. 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 with an initial profile picture such as this:




6. Next you are asked for any updates to the profile image. Provide changes or enter **Move on** to continue.
7. Next you enter specific requirements or any adjustments for creating follow-up emails. We have these instructions in separate files and will add them later to the agent.
8. Click the **Configure** button in the top header bar to provide detailed configuration.



**Meeting Follow-up Mailer**  
• Draft

Create Configure



**Name**  
Meeting Follow-up Mailer

**Description**  
Turns meeting notes into polished, professional follow-up emails.

**Instructions**  
This GPT converts meeting notes into polished follow-up emails. It reads bullet points, transcripts, or raw summaries, identifies key takeaways, decisions, and action items, and transforms them into professional, concise emails suitable for clients, teams, or stakeholders. It maintains factual accuracy—never invents information—but fills gaps gracefully with placeholders (e.g., “to confirm”). When tone or recipients aren’t specified, it defaults to a professional but friendly business tone. It includes an optional short version for quick follow-ups. It can adapt writing style: formal, friendly, assertive, or concise. It confirms recipients, goals, and tone when unclear but proceeds intelligently when partial

Conversations with your GPT can potentially include part or all of the instructions provided.

**Conversation starters**

Turn these meeting notes into a client follow-up email	×
Create a team recap email from these notes	×
Draft a concise summary email from this meeting transcript	×

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


## Step 2: Customize Instructions

In the Instructions box, add your company details *below* 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 above your details!**


**Meeting Follow-up Mailer**
• Draft

Create

Configure

**Instructions**

Context is provided to keep formatting clean and email ready, including subject lines, recap sections, and clear next steps.

Company Details:

- Company: AIA Copilot
- Your Name: Scott
- Email: scott@aiacopilot.com
- Calendar Link: https://aiacopilot.com

Conversations with your GPT can potentially include part or all of the instructions provided.

**Conversation starters**

Turn these meeting notes into a client follow-up email	×
Create a team recap email from these notes	×
Draft a concise summary email from this meeting transcript	×
Write a professional action-item email for the project team	×
	×

**Knowledge**

Conversations with your GPT can potentially reveal part or all of the files uploaded.

Upload files



### Step 3: Customize Knowledge

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

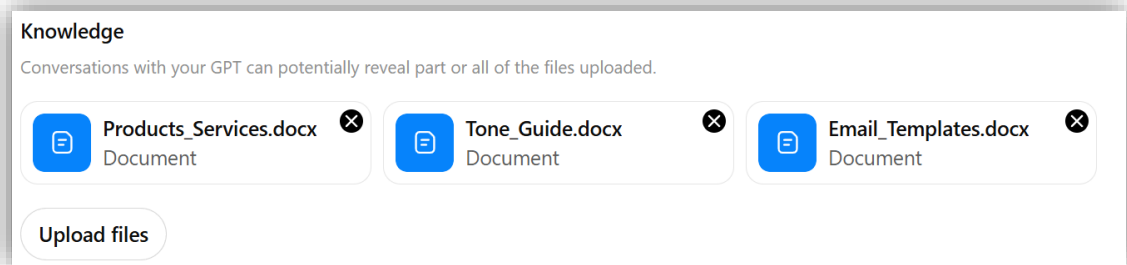
1. **Email Templates** ([https://lab.aiacopilot.com/email\\_template.docx](https://lab.aiacopilot.com/email_template.docx))
2. **Tone Guide** ([https://lab.aiacopilot.com/tone\\_guide.docx](https://lab.aiacopilot.com/tone_guide.docx))
3. **Service Descriptions** ([https://lab.aiacopilot.com/product\\_service.docx](https://lab.aiacopilot.com/product_service.docx))

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.

Note: These files can be customized for your own business

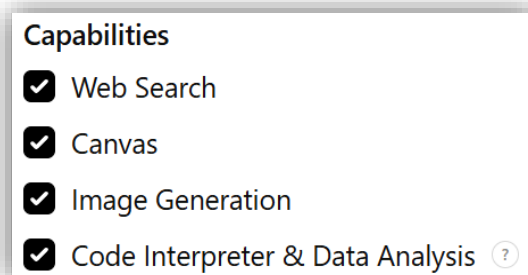
**To add each document to the GPT (agent):**

4. Scroll down below **Conversation Starters** to **Knowledge** and click **Upload Files**.
5. Select the **3 downloaded files (Tone\_Guide, Products\_Services, Email\_Templates)** in your **downloads** folder and click **Open**.



### Step 4: Customize Capabilities

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 Conversation Starters and Save the GPT

1. Scroll up to Conversation Starters and replace the default recommendations with the following. Note you can copy and paste this text from <https://train.aiacopilot.com/agent-lab/>

Starter
Create a follow-up email for a prospect who is interested but needs time to decide. Include next steps and maintain momentum.
Draft an enthusiastic follow-up for a client ready to move forward. Include contract next steps and onboarding timeline.
Write a friendly email to reschedule with someone who missed our meeting. Keep tone understanding and professional.
Create a follow-up email checking on a proposal sent last week. Be helpful not pushy.
Write a thank you email after first meeting with a potential client. Reference what we discussed and suggest next steps.
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, select **Only me** and click **Save**. Click **View GPT** to open it up.

✓ **Checkpoint:** You see your agent listed in the GPTs section of ChatGPT.

## Step 6: 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

# 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:** \$



## 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]