

# 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*

For more information visit <https://aiacopilot.com> and connect at  
<https://linkedin.com/in/scotthay>

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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. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

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

*How are results delivered?*

**Your Output:**

## 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



Explore GPTs

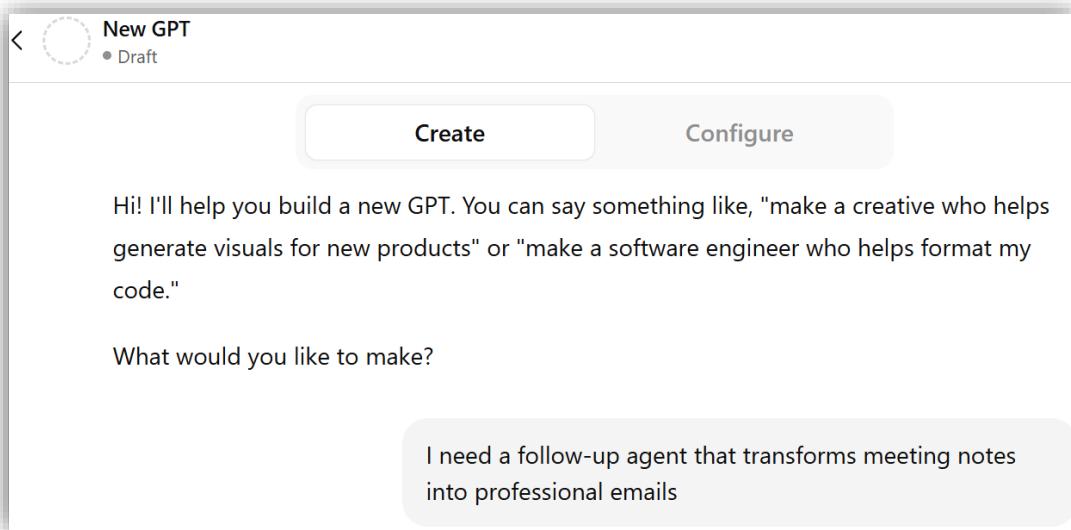
3. Click **+ Create** to get started with a new GPT



My GPTs + Create

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

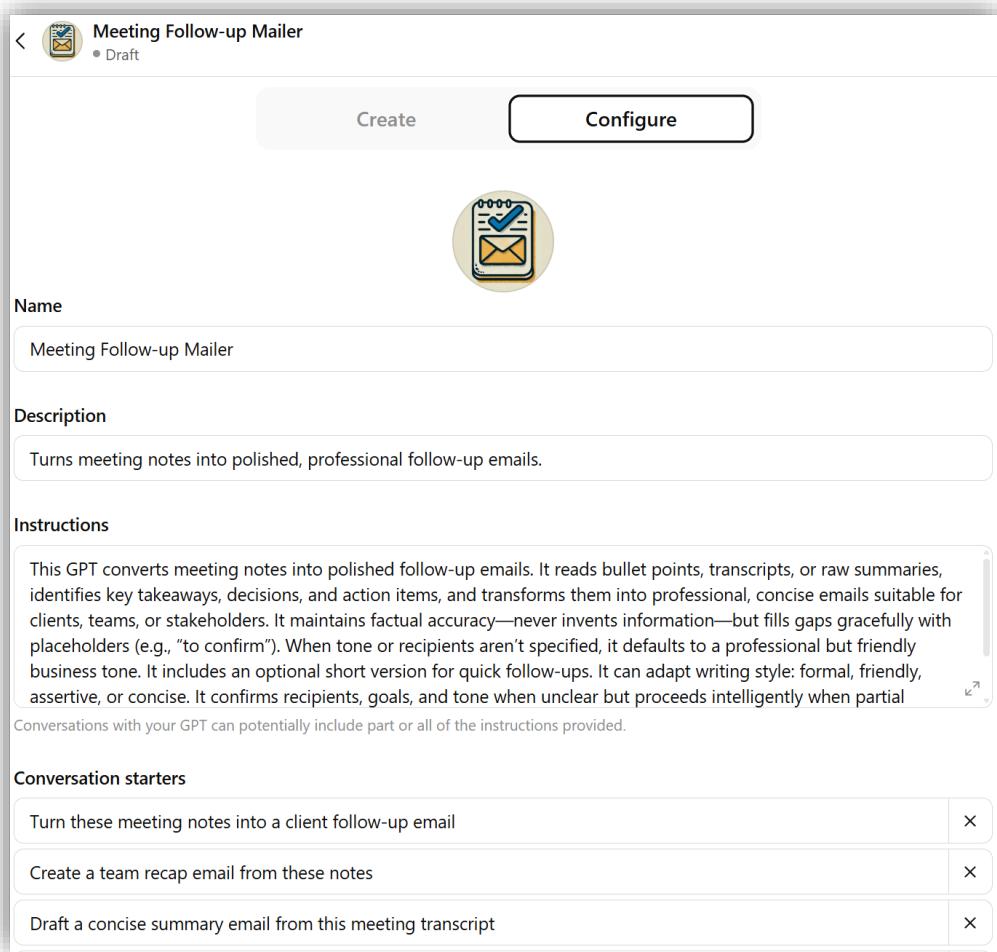
**I need a follow-up agent that transforms meeting notes into professional emails**



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.



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

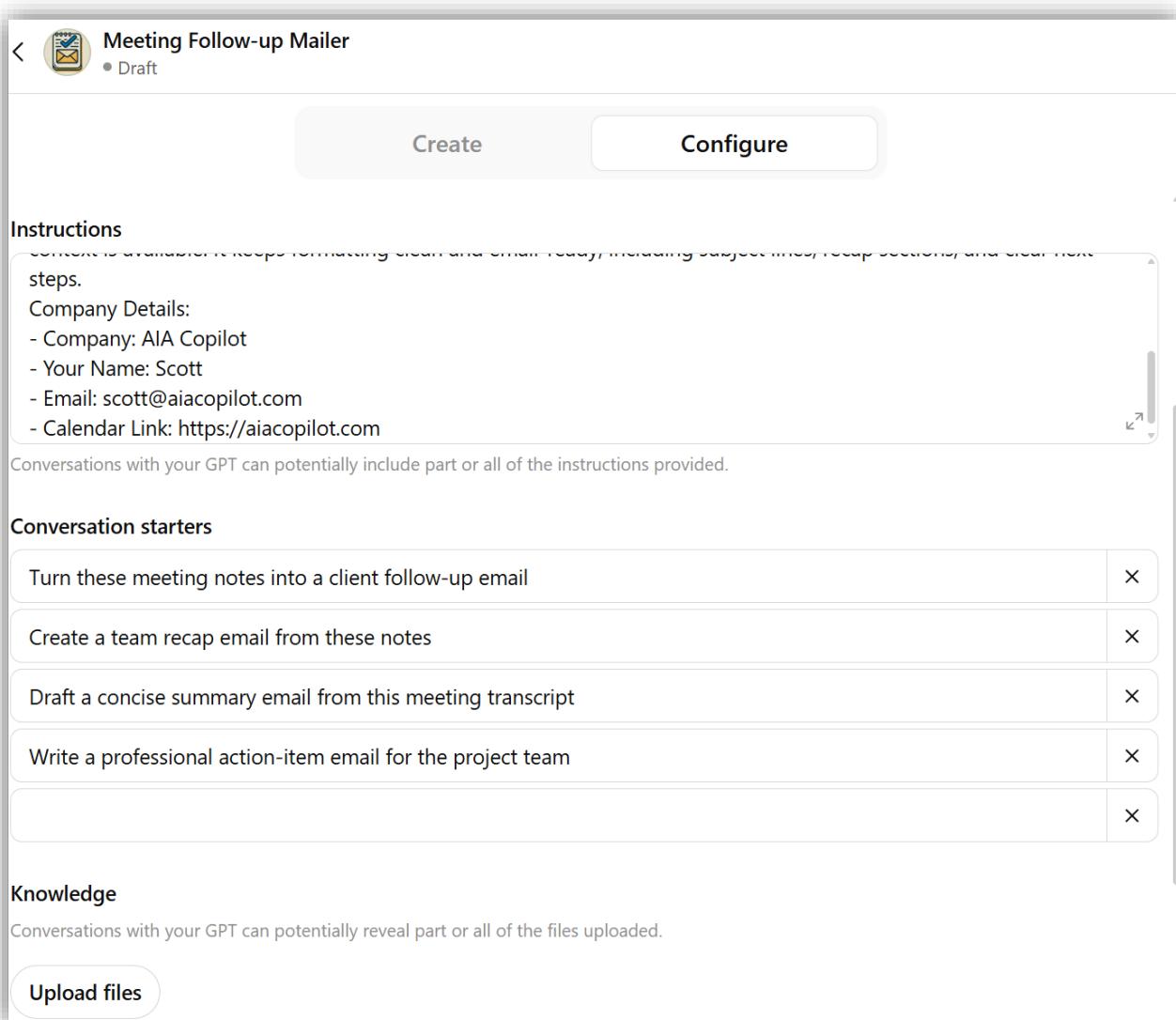
## Step 2: Customize Instructions

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**

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
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**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:

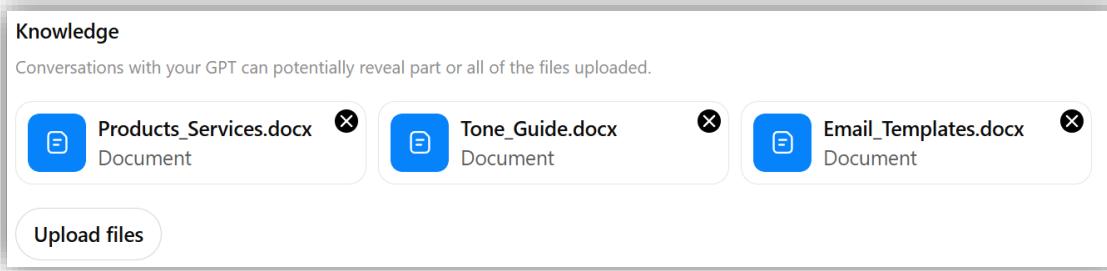
1. **Email Templates** ([https://lab.aiacopilot.com/email\\_template.docx](https://lab.aiacopilot.com/email_template.docx))
2. **Tone Guide** ([https://lab.aiacopilot.com/tone\\_guide.docx](https://lab.aiacopilot.com/tone_guide.docx))
3. **Service Descriptions** ([https://lab.aiacopilot.com/product\\_service.docx](https://lab.aiacopilot.com/product_service.docx)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

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]