CVTA
Concho Valley Technology Alliance

ASU SBDC
Angelo State University · Small Business Development Center

CulturaMinds

PRINTABLE WORKSHOP HANDOUTS

Copilot Agent Builder Handouts

Take-home reference for tonight's room · landscape · print or PDF

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01 Can / Cannot

02 Competitor cards

03 Take-home checklist

04 Suggested prompts

Can / Cannot — Copilot Agent Builder

Tonight's lab only · Suggested prompts = title + message · not Copilot Studio

CAN tonight

- ✓ Named specialist with one clear job
- ✓ Instructions = tone · steps · refusals · escalate
- ✓ Curated Knowledge files you choose
- ✓ Suggested prompts (title + message) · Try it before Create
- ✓ Share with people (Can chat / Can edit)

CANNOT / not tonight

- × Replace legal, tax, medical, or lending advice
- × Guarantee 100% accuracy without human review
- × Copilot Studio / Actions / multi-system automation
- × Read all your org's files by default
- × Bypass Microsoft 365 permissions
- × Train a custom ML model on your data
- × Be the system of record for money or compliance

Competitor cards — teaching lens

Agents (Copilot) · GPTs · Gems · Projects · Grok · VERIFY prices before any purchase

VERIFY caveat — approx USD list researched 2026-09-16 (America/Chicago).

Vendors change plans often. Confirm on the official pricing page. Not purchase advice — teaching frame only.

Agents (Copilot)

Copilot Agent Builder

Declarative agents: name, instructions, knowledge, Suggested prompts.

Approx (VERIFY): M365 Copilot add-on ~$30/user/mo yearly; Business bundles vary (~$18–$32). Builder is part of Copilot licensing (not a separate SKU).

Strength: SharePoint/OneDrive + org permissions.

Watch-out: Studio / Actions = not tonight.

GPTs

ChatGPT · Custom GPTs

Named GPTs with instructions + knowledge.

Approx (VERIFY): Plus ~$20/mo; Go ~$8; Business ~$20–25/user; Premium higher. New GPT creation often needs Business/Enterprise/Edu.

Strength: Fast iteration · familiar.

Watch-out: Separate from M365 permissions.

Gems

Google Gemini · Gems

Custom Gems (instructions + knowledge files).

Approx (VERIFY): Generally with Gemini / Workspace Business–Enterprise. Workspace list ~$7–$22/user/mo annual (dynamic).

Strength: Natural if Drive/Docs is SoR.

Watch-out: Depth varies by edition & admin toggles.

Projects

Claude · Projects

Projects with instructions + project knowledge.

Approx (VERIFY): Pro ~$17–20/mo; Team ~$20–25/seat; Premium & Max higher.

Strength: Long documents · careful writing.

Watch-out: Not native Microsoft Graph grounding.

Grok

Grok (xAI)

Chat with real-time web/X flavor; paid tiers unlock higher limits.

Approx (VERIFY): Free $0 (limits); SuperGrok ~$30/mo; SuperGrok Plus ~$100/mo. Higher / Enterprise — verify.

Strength: Exploratory real-time Q&A.

Watch-out: Not M365 file governance. Free has limits.

Teaching lens: Where do files live? Who must share? What must never be invented? Tonight = Copilot Agent Builder ONLY.

Take-home checklist

culturaminds.com/workshop · four agents · practices

Four agents — download from culturaminds.com/workshop

Listing Q&A

culturaminds.com/workshop → Realtor zip

MLS-summary.docx · disclosure-notes.docx · hoa-fees.docx

Menu & Hours

culturaminds.com/workshop → Coffee shop zip

Menu_2026-09.docx · Hours.docx · allergen-notes.docx

Client Books Helper

culturaminds.com/workshop → Bookkeeper zip

ClientX-invoices.xlsx · ClientX-engagement-letter.docx · August-PnL.docx

Complaints Helper

culturaminds.com/workshop → Complaints zip

open-complaints-log.docx · return-refund-policy.docx · response-playbook.docx · sample-inbox-notes.docx

Practices

1. One job, clear name + description
2. Behavior lives in Instructions
3. Atomic step-by-step instructions
4. Curate knowledge tightly
5. Ground to sources (cite or say unknown)
6. Respect file permissions
7. Stay in Copilot Agent Builder tonight
8. Draft outbound → human confirms
9. 3+ Suggested prompts (title + message)
10. Test where they'll use it

Suggested prompts cheat sheet

Each chip needs a title (short label) + message (full question the agent receives)

Listing Q&A

List price & days	What is the list price and how many days on market?
HOA dues	What are the monthly HOA dues and what do they cover?
Short-term rentals	Are short-term rentals allowed by the HOA?
Roof history	When was the roof replaced, and was there a hail claim?

Menu & Hours

Saturday hours	What time do you open and close on Saturday?
Latte with oat	How much is a 16 oz latte with oat milk?
Peanut allergens	Which items contain peanuts or peanut butter?
Thanksgiving	Are you open on Thanksgiving?

Client Books Helper

Open invoices	Which invoices for Lone Star Fence Co are still Open?
Retainer scope	What is included in the monthly bookkeeping retainer?
August P&L	What was August total income and gross profit?
Out of scope	What is out of scope in the engagement letter?

Complaints Helper

Case CO-1042	What's the status of case CO-1042?
No-receipt returns	What's our return window without a receipt?
Draft tent reply	Draft a reply for the damaged tent case (CO-1042).
Price match	Can we price-match Alicia's Yeti chair (CO-1056)?