CVTA
Concho Valley Technology Alliance

ASU SBDC
Angelo State University · Small Business Development Center

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CVTA + ASU SBDC PRESENT

Microsoft 365 Copilot Agent Builder

2-Hour Hands-On Workshop
September 17, 2006

Gin Jespersen · Digital Transformation · CulturaMinds

No Recording

Copilot Agent Builder only

Downloadables

The Art of the Possible

"Sensibly Linked"

No recording, please

Protect privacy for everyone in the room.

- No audio or video recording of this session
- No photos of slides or other people's screens (unless authorized)
- You'll get take-home files



Tonight's flow · 6:00–8:00 PM

Build along or watch · pick a demo folder · Copilot → Agents → New agent → Configure

6:00–6:15 PM	**Introductions** **Settling In**	Gin Tim CulturaMinds
6:15–6:45 PM	**Use Case Scenario** **AI Agent Samples**	Compensation & Job Description Agentic Solution Impact on Productivity and Revenue
6:45–7:50 PM	**Build – Lab Time**	Agent Choices to Build Your Custom AI Agent
7:50–8:00 PM	**Close**	Appendix PDF Files Email: gin@culturaminds.com

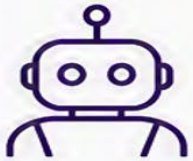
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Digital Transformational Capabilities

	DIGITAL CAPABILITY	BUSINESS OUTCOME	
1	AI & Intelligent Automation	Efficiency, productivity, cost savings	
2	Human Capital Management Transformation	Workforce modernization	
3	ERP, Payroll & Timekeeping Modernization	Operational excellence	
4	M&A Systems & Culture Integration	Faster value realization	
5	Global Service Delivery & Operating Model Design	Scalability and business agility	

AI Common Terminology

1



AI Agent

An autonomous software system that can perceive, reason, decide, and act to achieve goals.

2



Agentic AI

AI that exhibits goal-directed behavior, planning, tool usage, and autonomous execution beyond simple chat interactions.

3



Autonomous Agent

An agent that operates with minimal human supervision and can self-manage tasks and decision-making.

4



Multi-Agent System (MAS)

A collection of specialized AI agents that collaborate, coordinate, or negotiate to solve complex problems.

5



Tool Use (Tool Calling)

The capability of an agent to invoke external APIs, applications, databases, or services to complete tasks.

6



Planning

The process of breaking a goal into steps, sequencing actions, and determining how to achieve an objective.

7



Memory

The ability of an agent to retain context, past interactions, and learned information for future decisions.

8



Reasoning

The cognitive process an agent uses to analyze information, evaluate options, and make decisions.

9



RAG (Retrieval-Augmented Generation)

A technique where agents retrieve information from external knowledge sources before generating responses or taking actions.

10



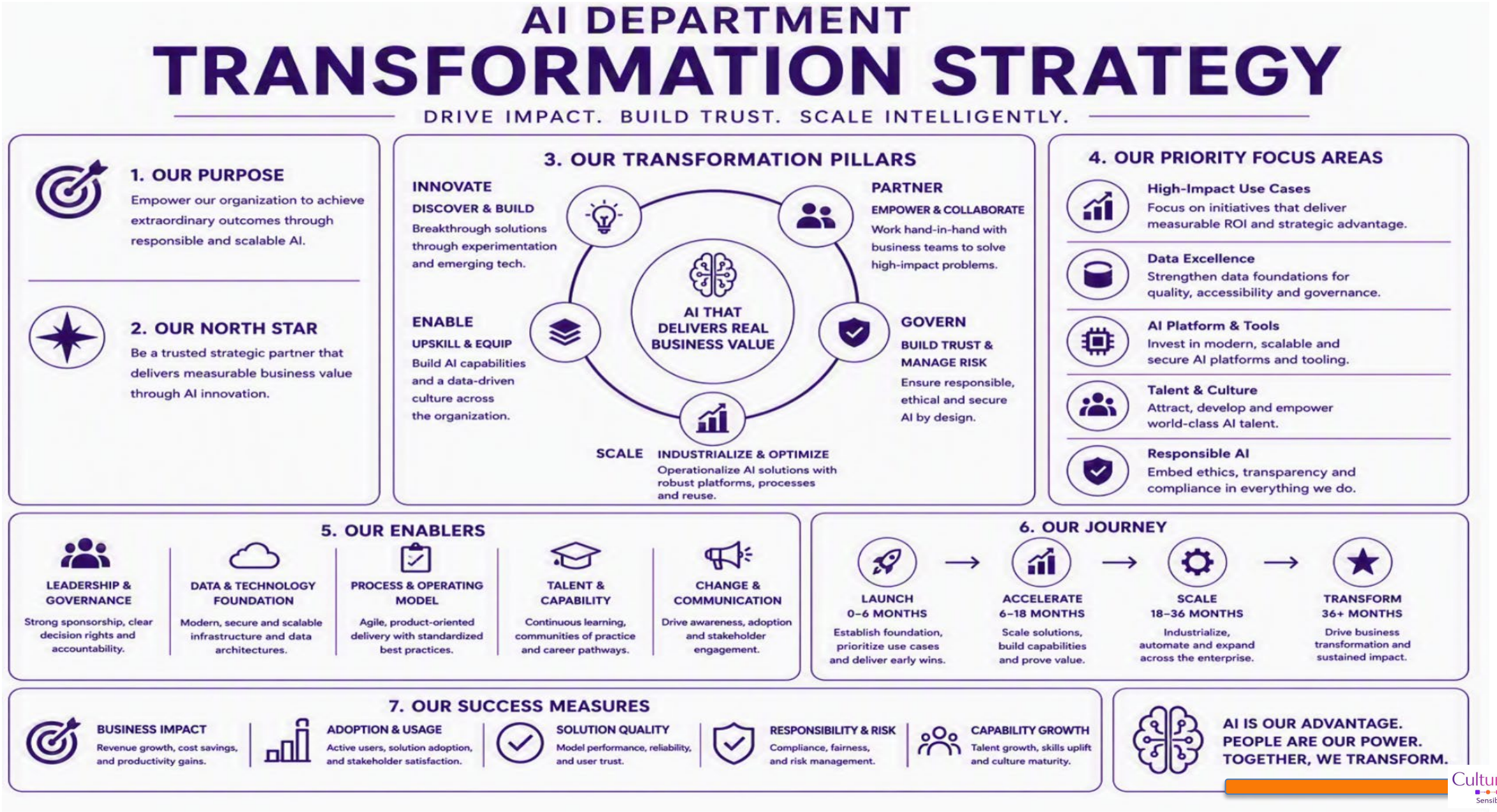
MCP (Model Context Protocol)

An emerging standard that enables AI agents to connect securely to tools, systems, and enterprise data sources.

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AI Transformation Strategy

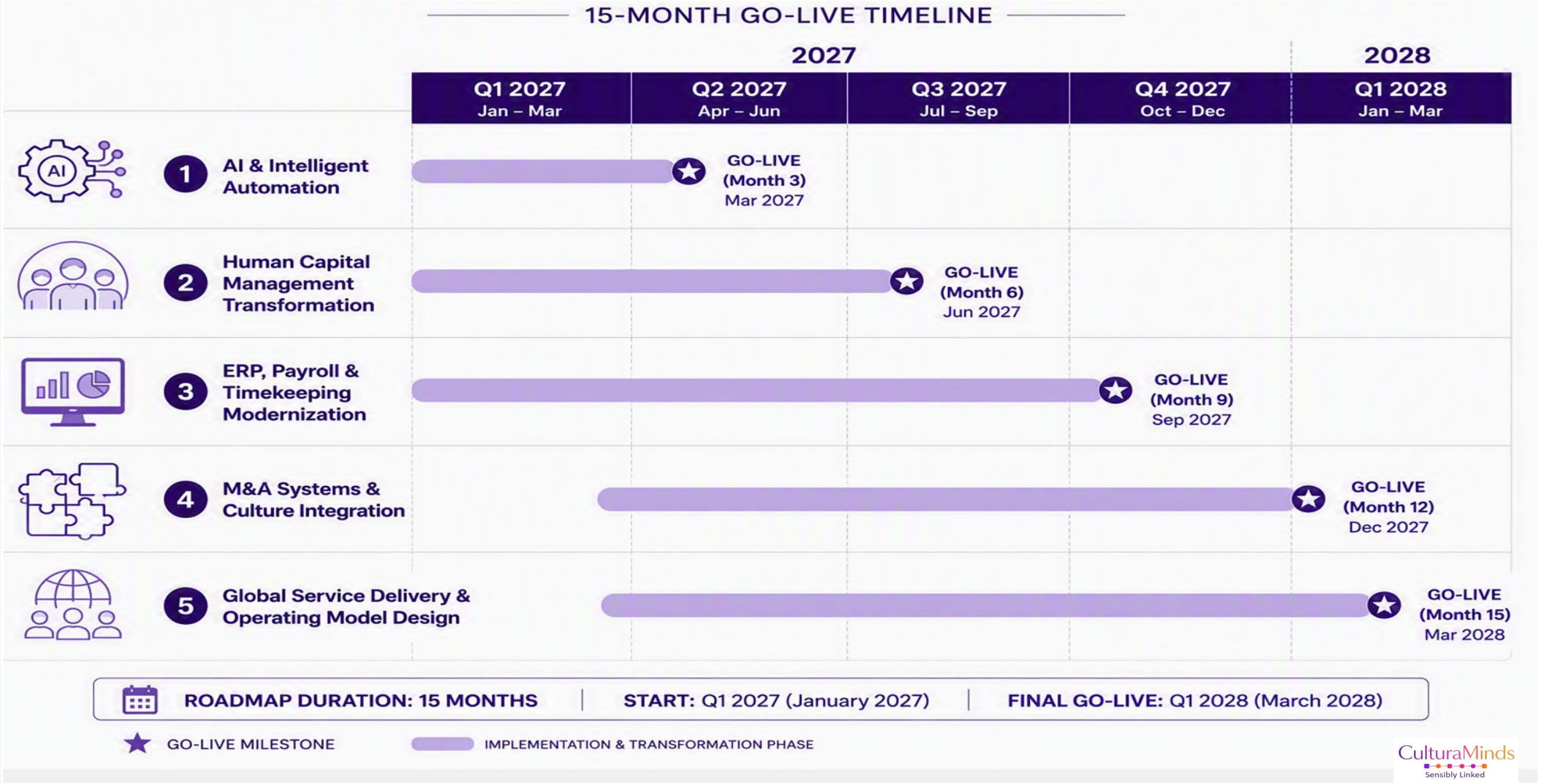
Illustration



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Timeline & Roadmap

Illustration



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Our Work Today

AI AGENTS FOR SMALL & MID-SIZED BUSINESSES

Smarter Answers. Happier Clients. Stronger Businesses.

Practical AI agents that work only with your documents—no guesswork, just reliable answers.

1 LISTING Q&A AGENT

Real Estate Professionals

PURPOSE

Provide instant answers from MLS sheets, disclosures, HOA documents, and property files.

KEY BENEFITS

- Eliminates time spent searching PDFs
- Delivers faster buyer responses
- Ensures consistency with official documents
- Reduces risk from incorrect information
- Clearly identifies when information is unavailable

BUSINESS IMPACT

- Faster client service
- Increased agent productivity
- Lower compliance risk

2 MENU & HOURS AGENT

Coffee Shops & Retail Operations

PURPOSE

Answer customer and employee questions using current menus, pricing, hours, and allergen information.

KEY BENEFITS

- Reduces interruptions for staff
- Improves customer experience
- Provides consistent answers across locations
- Prevents outdated information from being shared
- Reduces onboarding time for new employees

BUSINESS IMPACT

- Better customer satisfaction
- Operational efficiency
- Reduced employee training burden

3 CLIENT BOOKS HELPER

Freelance Bookkeepers & Accounting Services

PURPOSE

Retrieve information from invoices, engagement documents, and financial reports for a specific client.

KEY BENEFITS

- Quickly answers payment and balance questions
- Drafts professional reminder communications
- Keeps client records isolated and secure
- Eliminates searching through folders
- Prevents fabricated financial information

BUSINESS IMPACT

- Faster client response times
- Improved collections process
- Greater accuracy and trust

COMMON BENEFITS ACROSS ALL AI AGENTS

PRODUCTIVITY
Reduce manual research and repetitive tasks.

FASTER RESPONSE TIMES
Deliver answers in seconds instead of minutes or hours.

ACCURACY & TRUST
Only uses approved business documents.

CONTROLLED ACCESS
Remains limited to the files and data you provide.

COST EFFICIENCY
Scale support capabilities without adding staff.

BUSINESS GROWTH
Allows employees to focus on higher-value client interactions.

AI AGENT VALUE FORMULA

= **LESS SEARCHING**
No more digging through files.

+ **FASTER ANSWERS**
Get reliable answers in seconds.

+ **CONSISTENT INFORMATION**
Aligned with your official documents.

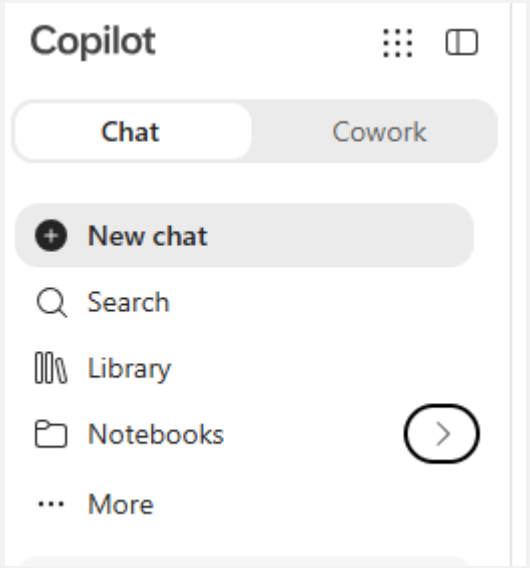
= **HIGHER PRODUCTIVITY & BETTER CUSTOMER EXPERIENCE**
Stronger relationships. Better results.

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Let’s Get Started

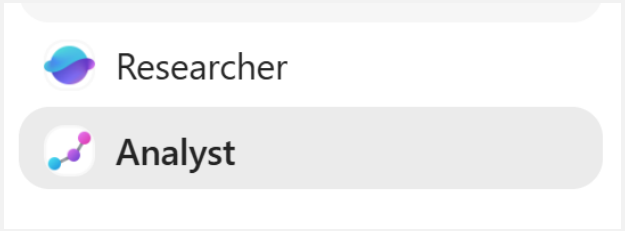
CoPilot, CoPilot Business, & CoPilot Studio

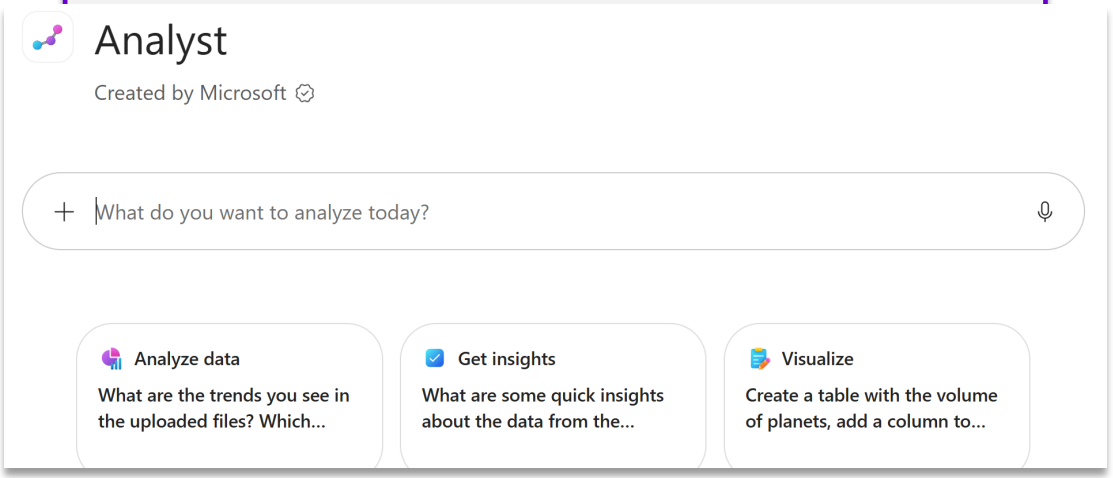
Copilot



M365

Copilot
BUSINESS PLAN FOR SMB





Copilot Studio

Out of Scope

MS COPILOT FOR BUILDING AGENTS

CHEAT SHEET

Build intelligent, secure, and scalable agents that automate tasks, answer questions, and drive business outcomes.

WHAT IS MS COPILOT FOR AGENTS?

MS Copilot empowers you to create AI agents that understand your data, automate processes, and work alongside people across Microsoft 365, Power Platform, and beyond.

QUICK START: BUILD AN AGENT

1. **Define the purpose**
   Identify the problem to solve and who the agent will help.
2. **Add knowledge**
   Connect to files, sites, databases, APIs, or other data sources.
3. **Design instructions**
   Provide goals, rules, tone, and how the agent should respond.
4. **Add actions**
   Enable the agent to take action using connectors and tools.
5. **Test and refine**
   Test in real scenarios and improve responses.
6. **Publish and share**
   Deploy to the right audience and start driving value.

AGENT CAPABILITIES

Natural Language Conversations
Engage users in meaningful dialog using natural language.

Knowledge Grounding
Use your organization's data to provide accurate and relevant answers.

Web & Real-Time Information
Access real-time web data and up-to-date information when needed.

Actions & Automation
Take actions, trigger flows, update systems, and complete tasks.

Security & Compliance
Inherit Microsoft 365 security, permissions, and compliance.

Multi-Channel Availability
Deploy across Microsoft 365, Teams, websites, and custom apps.

Analytics & Insights
Track performance, conversations, and business impact.

Extensible & Scalable
Extend with custom connectors, APIs, and Power Platform.

POWERFUL CONNECTORS

Microsoft 365
SharePoint, OneDrive, Outlook, Teams, Excel, Word, PowerPoint

Data Sources
SQL, Dataverse, Azure, and enterprise databases

Web & APIs
Connect to external APIs and web services

Business Apps
SAP, Salesforce, ServiceNow, Dynamics 365, and more

Power Platform
Power Automate, Power Apps, Power BI, Dataverse

COMMON USE CASES

Knowledge Assistants
Answer questions and surface insights from internal content.

Process Automation
Automate repetitive tasks and business processes.

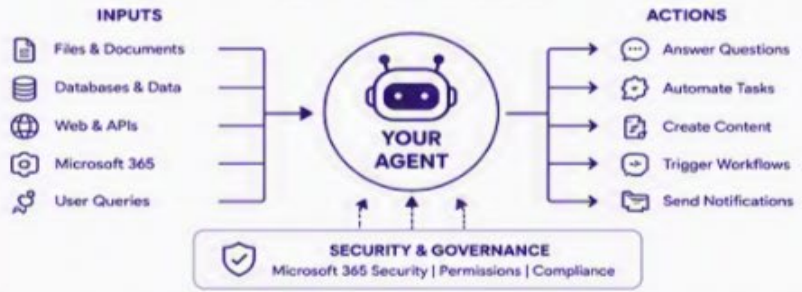
Employee Support
Help employees find information, policies, and resources.

Customer Service
Resolve issues faster with intelligent, context-aware responses.

Sales Enablement
Support sellers with data, content, and next-best actions.

IT Helpdesk
Automate IT support and service management tasks.

AGENT ARCHITECTURE



BEST PRACTICES

- Start small and solve a real problem
- Ground the agent in trusted data
- Keep instructions clear and focused
- Design for security and compliance
- Test, iterate, and measure impact
- Continuously improve and scale

TIPS

- Use clear, specific instructions to guide behavior.
- Keep knowledge sources organized and up to date.
- Leverage Power Platform for advanced actions.
- Monitor usage and feedback to improve continuously.
- Think big, start small, scale fast.

BUILD. AUTOMATE. TRANSFORM.
Create agents that work for your people and your business.

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AI Maturity Curve

Tonight = Do a task (Agents or Copilots) · Copilot Agent Builder



1 Ask

(Prompts or Chatbots)

Tonight

2 Do a task

(Agents or Copilots)

Copilot Agent Builder

3 Automate job

(Bot)

4 Staff function

(Team of Bots)

Start by doing a task with a Copilot specialist. Automate job and team-of-bots come later.

Agent Structure — 4 Key Elements

Instructions

Behavior rules: how to answer, refuse, cite, escalate

Example: be brief · refuse legal/tax advice · always point back to the pack

Knowledge

Files you attach — the facts

Example: menu Word file · HOA Word file · invoice Excel sheet

Grounding

Prefer attached sources over inventing

Example: if it is not in the files, say you do not know

Permissions

M365 file access travels with the files

Example: if they cannot open the file, the agent cannot either

Go to CulturaMinds.com/workshop/

http://www.culturaminds.com/workshop/

The 10 Best AI Agent Best Practices

1. **Define a Clear Purpose and Scope**
    1. State the primary task, problem solved, and expected outcome before writing instructions.
    2. Set firm boundaries on what the agent should and should not do.
2. **Select the Right Information Sources**
    1. Limit knowledge repositories to specific, verified files like curated SharePoint sites, OneDrive folders, or HR policies.
    2. Enable the "only use specified sources" setting to prevent unwanted web hallucinations.
3. **Write Precise, Modular Instructions**
    1. Use clear natural language to describe the agent's behavior, tone, and role guidelines.
    2. Break complex guidelines into smaller, reusable instruction sets.
4. **Establish Clear Access Permissions**
    1. Align agent sharing settings with the underlying document security permissions.
    2. Restrict sensitive organizational data sources so users only access what they are authorized to see.
5. **Incorporate Human Oversight and Escalation**
    1. Design autonomous or high-impact workflow agents with clear trigger points for human review.
    2. Ensure critical decisions (like approvals or financial actions) route back to human staff.
6. **Iterate and Test via Natural Language Preview**
    1. Use the built-in configuration and preview chat interface to test edge cases interactively.
    2. Refine instructions iteratively when the agent misses context or answers outside its boundaries.
7. **Leverage Specialized Built-In Agents**
    1. Utilize pre-configured specialized capabilities like the Researcher or Analyst agents for intensive source comparison or structured data insights.
    2. Avoid redundant prompt engineering by letting built-in orchestration handle data parsing where applicable.
8. **Monitor Performance via Logs and Feedback**
    1. Review user feedback and interaction logs to identify recurring unhelpful responses.
    2. Update system instructions regularly based on real-world usage patterns.
9. **Transition Basic Agents to Copilot Studio for Scale**
    1. Start with quick no-code configurations in the standard Agent Builder for personal or team tasks.
    2. Move agents to full Microsoft Copilot Studio when advanced custom integrations, APIs, or event-driven workflows are required.
10. **Submit to Governance**
    1. Test agents thoroughly within a small team before seeking admin approval.
    2. Publish finalized tools to the company catalog for controlled, enterprise-wide deployment.

Thank you

Hosted by CVTA + ASU SBDC

Facilitator: Gin Jespersen · CulturaMinds
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& Special Guest Speaker, Tim Jespersen

www.culturaminds.com

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OPTIONAL

Appendix

Troubleshooting and a quick look inside an agent — extras outside the main flow

Four equal scenario packs — Gin picks 1–2 live

1 · Realtor

Listing Q&A

College Hills · 2142 College Hills Blvd · list $285,000
MLS · disclosures · HOA $45/mo

2 · Coffee

Menu & Hours

Concho River Roasters
Menu · hours · allergens

3 · Bookkeeper

Client Books Helper

Lone Star Fence Co
Invoices · engagement · P&L

4 · Complaints

Complaints Helper

Concho Outfitters
Log · policy · playbook · inbox

AGENT

Listing Q&A

College Hills · 2142 College Hills Blvd · $285,000

PURPOSE

Helps a solo realtor answer questions about ONE active listing from MLS summary, disclosure notes, and HOA fees only.

WHAT WE'RE PROVING TONIGHT

Prove grounded answers on HOA / rental rules / roof; refuse anything not in the packet.

SCENE

Open house weekend near ASU — buyers ask price, HOA, roof. One listing, three files.

Knowledge (pack files only)

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

Listing Q&A — Try it & your turn

TRY IT — Ask

What are the monthly HOA dues and are short-term rentals allowed?

Expect

$45/month · short-term/Airbnb not permitted (min 6-month) · optional $660 annual w/ $120 roads

Your turn (if you have Copilot Agent Builder)

What year was the roof replaced?

Expect 2019 (composition shingle)

Menu & Hours

PURPOSE

Customer-facing helper for menu prices, hours, location, allergen notes from shop files only.

WHAT WE'RE PROVING TONIGHT

Prove latte + oat = $5.75 and weekend hours; never invent "allergy-safe" guarantees.

SCENE

Downtown Chadbourne — same questions many times: Saturday hours and oat milk.

Knowledge (pack files only)

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

Menu & Hours — Try it & your turn

TRY IT — Ask

How much is a 16 oz latte with oat milk?

Expect

$5.00 + $0.75 = $5.75

Your turn (if you have Copilot Agent Builder)

What are Saturday and Sunday hours?

Sat 7:00 AM–4:00 PM · Sun 8:00 AM–2:00 PM

DEMO 3 · BOOKKEEPER

AGENT

Client Books Helper

Lone Star Fence Co

PURPOSE

Assistant for a freelance bookkeeper — invoice status, engagement scope, P&L facts from the books pack only.

WHAT WE'RE PROVING TONIGHT

Prove open invoices by ID/amount; escalate tax-return prep to CPA per engagement letter.

SCENE

Client texts from Sherwood Way: "What's unpaid?" Want invoice IDs, not guesswork.

Knowledge (pack files only)

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

Client Books Helper — Try it & your turn

TRY IT — Ask

Which invoices for Lone Star Fence Co are still Open?

Expect

INV-1044 $320 · INV-1045 $890 · INV-1046 $1,250

Your turn (if you have Copilot Agent Builder)

Is tax return prep in scope?

No — escalates to CPA per engagement letter

Complaints Helper

PURPOSE

Front-desk helper that looks up cases and drafts policy-grounded replies for a human to send — never marks resolved or emails the customer.

WHAT WE'RE PROVING TONIGHT

Prove CO-1042 status + draft replace-or-refund; apply no-receipt store-credit rules when asked.

SCENE

Outdoor retail on Chadbourne — complaints are emotional; policy is the guardrail.

Knowledge (pack files only)

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

Complaints Helper — Try it & your turn

TRY IT — Ask

Status of CO-1042 — and draft a short replace-or-refund reply?

Expect

Open · Priya · damaged tent · replace or full refund · waive return shipping · human confirms draft

Your turn (if you have Copilot Agent Builder)

Chris wants a card refund — cash, no receipt. Can we?

14-day no-receipt → store credit only (CO-1059)