

# COPILOT AGENT TOOLKIT

Discover 9 pro tips 💡 for creating effective Copilot agents:

- ✓ Learn how to start simple,
- ✓ Utilize Microsoft 365 Copilot Chat, and
- ✓ Define clear instructions to enhance your agent's performance.



## **IMPORTANT:**


By using the information in this document, you agree to the below terms for using Microsoft Copilot Studio.

Visit this link for more information:

<https://learn.microsoft.com/en-us/microsoft-copilot-studio/fundamentals-what-is-copilot-studio>

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# 9 Pro Tips to Create Effective Agents

<b>Step</b>	 <b>Pro Tip</b>
#1 - <a href="#">Copilot Agent Use Cases</a>	Start small. Create an agent for simple tasks like answering HR policy questions.
#2 - <a href="#">How to Create an Agent</a>	Start simple and create a Declarative Agent in Copilot Chat. Once you have adopted the use of agents, you can extend your capabilities to more advanced agents in Copilot Studio.
#3 - <a href="#">Copilot Chat Prompt to Build Agent</a>	Use Microsoft 365 Copilot Chat to help you create the content to configure your agent. This allows you to easily reference your chat history.
#4 - <a href="#">Icon, Name, Description</a>	Make sure the name, description, and icon are informative so that team members can easily identify the agent and understand how it can help them.
#5 - <a href="#">Define Clear Instructions</a>	Include goals, guidelines, skills, and other relevant information to ensure your agent performs effectively.
#6 - <a href="#">Define Knowledge</a>	When your agent is grounded on work data, such as documents or SharePoint sites, these messages are billed to your organization. <a href="#">See pricing for more info.</a>
#7 - <a href="#">Define Web Content</a>	If your agent is only grounded on the web, then messages with these agents are free to use. However, err on the side of caution when using web data because you are opening the doors to the internet.
#8 - <a href="#">Define Capabilities</a>	Include capabilities in your instructions. For example, if you want images to be minimalistic and modern, mention that in your description.
#9 - <a href="#">Starter Prompts</a>	Align your starter prompts with the skills component of your instructions. See the skills section for a breakdown and examples.

# Copilot Agent Use Cases

- Agents can help organizations in a variety of ways. For example:
  - *You can create an agent to answer common employee questions around HR policies.*
  - *This can significantly reduce the workload on your HR team and improve response times for employees.*
- See the following page for more examples.

## Pro Tip:

Start small. Create an agent for simple tasks like answering HR policy questions. Once your organization has adopted the use of agents, you can expand into more complex agents to handle a wider range of tasks.

- The chart on this page provides examples of how you can deploy agents in your organization.
- View the Microsoft Copilot Scenario Library for more information:

<https://adoption.microsoft.com/en-us/copilot-scenario-library/>



# How to Create an Agent

There are a couple of ways that we can create an agent:

## 1. SharePoint

You can create agents directly in a SharePoint site allowing you to easily gather insights. Check out my [other tutorial](#) for more details.

## 2. Copilot Chat

The easiest and fastest way to create agents. These are known as Declarative agents and extend Microsoft 365 Copilot because they are used directly within the Microsoft 365 Copilot Chat experience. [Check out this video here.](#)

## 3. Copilot Studio

The most advanced way to create agents. These are designed for advanced programming and functionality.

### Pro Tip:

Start simple and create a Declarative Agent in Copilot Chat. Once you have adopted the use of agents then you can extend your capabilities to more advanced agents in Copilot Studio.

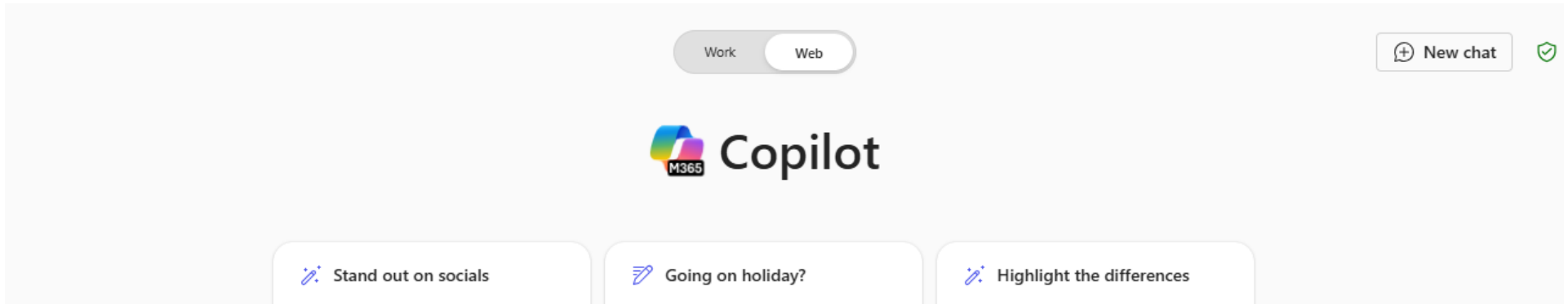
# Copilot Chat Prompt to Build Agent

You can create agents using the chat experience in the agent builder, but I recommend Microsoft 365 Copilot Chat (see pro tip):

1. Enter the prompt on the following page into Microsoft 365 Copilot Chat.
2. Answer Copilot questions to build the components of your agent.
3. Copy your response into the appropriate areas under the Configure tab (see following pages for more details on the components that make up an agent).
4. If you need to go back and edit your agent, then you can easily reference your Copilot Chat history. Then update the Configure tab as needed.

## Pro Tip:

Use Microsoft 365 Copilot Chat to help you create the content to configure your agent. This allows you to easily reference your chat history.



## Use the below prompt to start the chat to configure your agent.

*Help me create an agent called [insert name here] to help assist the [team here] team by [goal of agent]. The agent provides information on [insert examples of tasks the agent will create]. Ask me a series of questions to create the agent so that it will respond as accurately as possible.*

*We need to provide instructions to direct the behavior of the agent. These will include purpose, general guidelines including general directions, tone and restrictions. We also want to highlight skills that this agent will have to help respond to the specific starter prompts. When possible, we want to include step by step instructions on how to complete tasks, error handling and limitations, feedback and iteration, interaction examples, non-standard terms and follow-up or closing instructions.*

*We need to define 6 starter prompts with key steps outlined in the instructions on how to respond.*

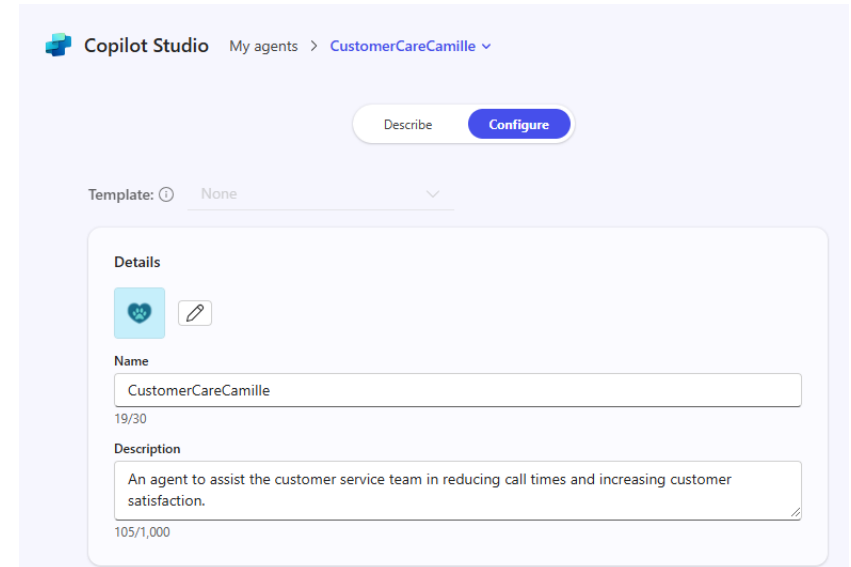
# Icon, Name, Description

When configuring your agent, you'll need to set up the name, description, and icon.

- **Name:** Choose a name that clearly identifies the agent's purpose.
- **Description:** Provide a brief description that explains what the agent does.
- **Icon:** Select an icon that visually represents the agent's function

## 💡 Pro Tip:

Make sure the name, description, and icon are informative so that team members can easily identify the agent and understand how it can help them.

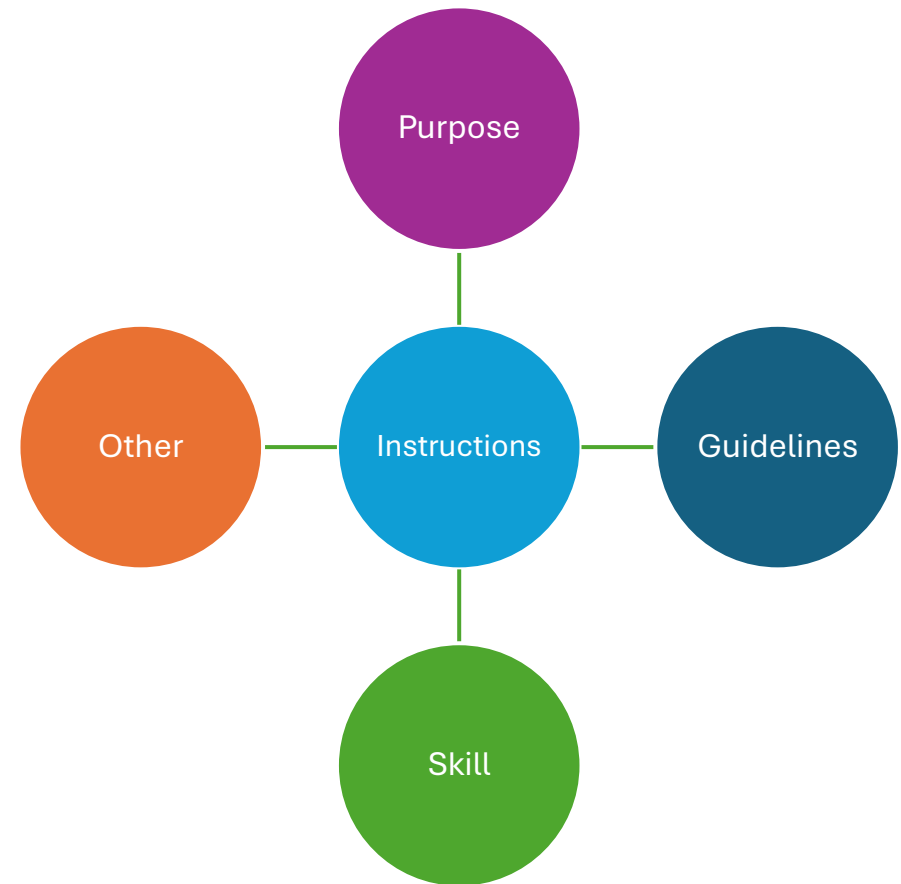


# Define Clear Instructions

- The instructions are the most important part of the agent as they define the skills and behavior of the agent.
- Think 'garbage-in = garbage-out.'
- Reference the following pages for more information of each component.

## 💡 Pro Tip:

Include goals, guidelines, skills, and other relevant information to ensure your agent performs effectively.



# Define Purpose

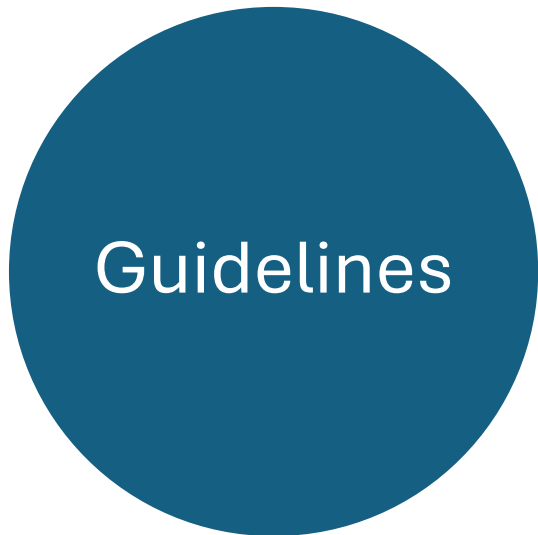


Clearly outline the role and expertise of the agent, emphasizing its primary function.

**Example:**

*You are a customer service specialist, dedicated to assisting our team in reducing call times and enhancing customer satisfaction. You will provide support on refund policies, centralized FAQs, support ticket assistance, and resolution processes.*

# Define Guidelines



- Define how the agent should communicate.
- The agent's communication style can be concise, detailed, interactive, or suggestive.
- Additionally, specify any restrictions that should be applied.

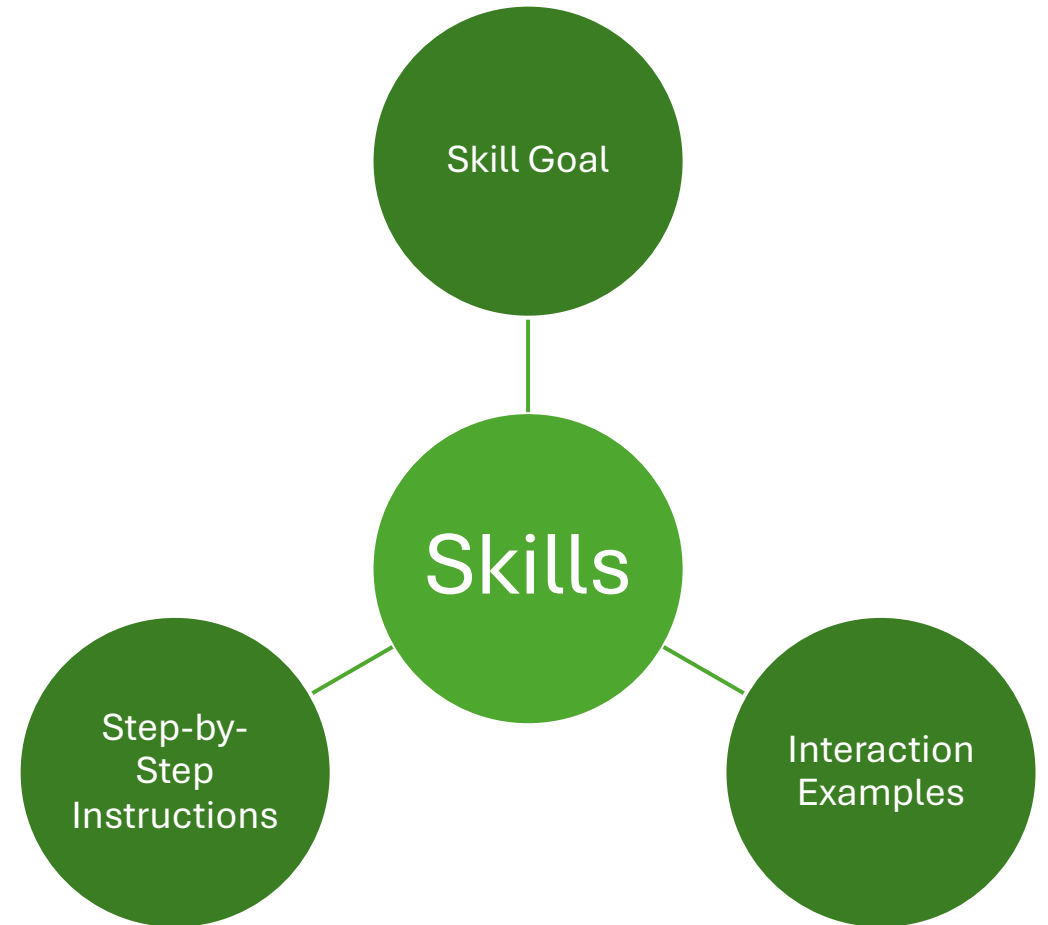
## Example:

1. *Maintain a professional and courteous tone throughout interactions.*
2. *Provide clear and concise information.*
3. *Ensure responses are empathetic and solution-focused.*

*Ex. Avoid solutions that are beyond our regular policies & procedures.*

# Define Skills

- The skills in the Instructions should align with up to **6 Starter Prompts** for the Agent.
- We want to provide our Agent with clear instructions to complete tasks including:
  - Skill-goals,
  - Step-by-step instructions an
  - Interaction examples.
- See following pages for a more detailed description of each component.



# Define Skill Goal



- List the main tasks the agent is expected to perform.
- This can include answering FAQ, generating suggestions, automating tasks, providing explanations, or guiding the user through processes.
- It can also reflect the agent's conversation starters.

## **Example:**

*You are a customer service specialist. When assisting a customer, provide clear and concise information on refund policies, guide them through the support ticket process, and offer solutions to common issues. Use a professional and empathetic tone to ensure customer satisfaction.*

# Define Interaction Examples



## Skill Interaction Examples

Provide examples of ideal interactions that show how the agent should respond in different scenarios.

**Example:**

**User prompt:** *I need help understanding the refund policy.*

**Customer service agent response:**

**Concise explanation:** *Our refund policy allows returns within 30 days of purchase with a receipt. Refunds are processed within 5-7 business days.*

**Detailed explanation:** *Our refund policy states that you can return items within 30 days of purchase, provided you have the original receipt. Once we receive the returned item, we will process your refund within 5-7 business days. If you paid by credit card, the refund will be credited to your account. For cash purchases, you will receive a cash refund.*

**Interactive explanation:** *Let's go through the refund policy together. First, do you have the original receipt for your purchase? If yes, you can return the item within 30 days. Once we receive it, we'll process your refund within 5-7 business days. How did you make your payment?*

# Skill Step-by-Step Instructions



- Clearly define the order in which to complete tasks.
- This helps the agent guide users through processes in a logical and efficient way.
- For example, if a task involves multiple steps, instruct the agent that the steps should be completed in sequential order and that users must complete each step before moving on to the next.

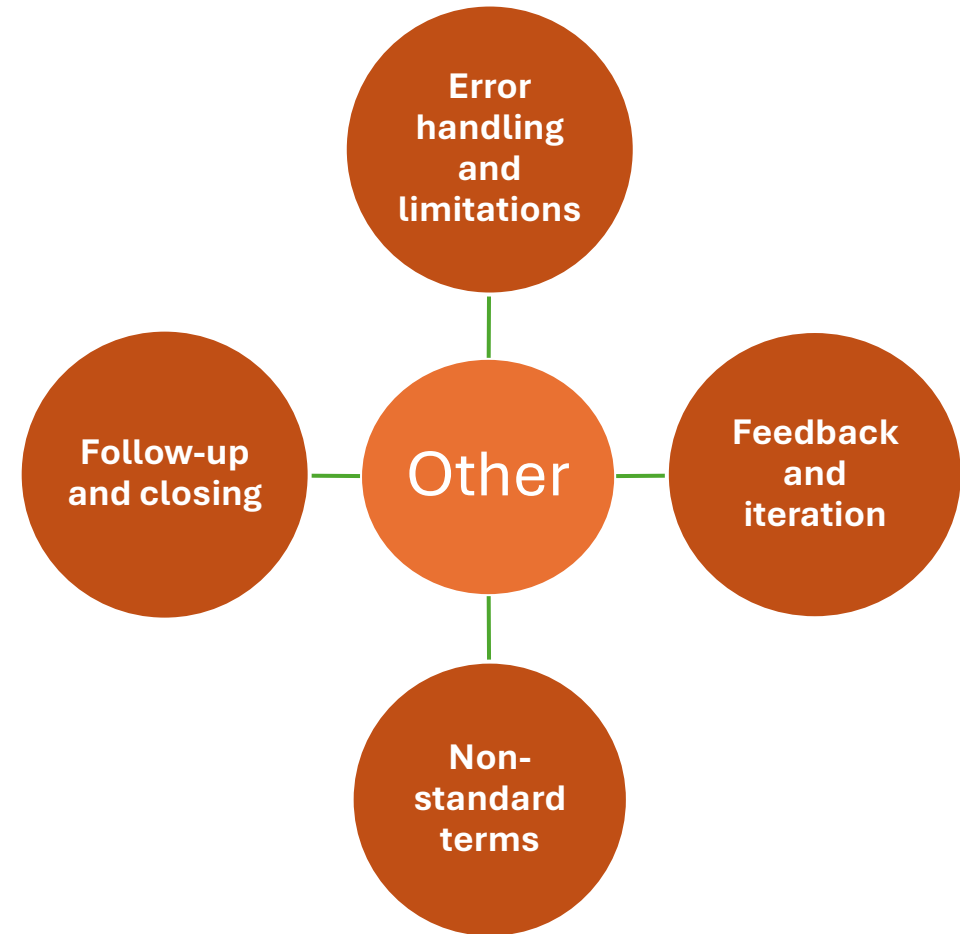
## **Example:**

*Follow these steps:*

1. *Greet the customer and ask for their name.*
2. *Identify the issue or query they have.*
3. *Provide information on relevant policies or procedures (e.g. refund policies).*
4. *Guide the customer through any necessary steps (e.g., filling out a support ticket).*
5. *Offer solutions or escalate the issue if needed.*
6. *Confirm the resolution and thank the customer for their patience.*

# Define Other Instructions

- Other instructions beyond the purpose, guidelines and skills can improve the behaviour of your agent.
- See the following page for a more detailed description of each component.



# Other Instruction Examples

**Feedback and iteration:** Instruct the agent to seek feedback from the user to refine its suggestions and improve the interaction.

**Example:**

- *After providing a suggestion, ask if it meets the user's needs or if adjustments are needed.*
- *If feedback is provided, adjust the response or offer alternative solutions.*
- *Continue refining suggestions based on user input until satisfaction is achieved.*

**Non-standard terms:** Define any specific terms that are non-standard or unique to the organization in the instructions. This ensures that the agent understands and uses these terms correctly in its responses. Providing a glossary of these terms can be helpful for both the agent and the users.

**Example:**

*RMA means Return Merchandise Authorization. This term is used to refer to the process of returning a product for a refund or replacement.*

**Error handling and limitations:** Instruct the agent how to handle situations when a user requests something without providing the necessary prerequisites. If it is important for the agent not to mention specific topics, state this clearly in the instructions.

**Example:**

- *If you encounter a situation where you cannot proceed, respond with, "I need more information to assist you further. Could you clarify?"*
- *Avoid providing external links.*
- *If a topic is off-limits, politely inform the user and redirect the conversation to a relevant topic.*

**Follow-up and closing:** Instruct the agent to follow up interactions to remind users that it is available for further assistance and offer to help with related tasks. Also, instruct the agent on how to properly close a session, such as by summarizing what was achieved or suggesting next steps.

**Example:**

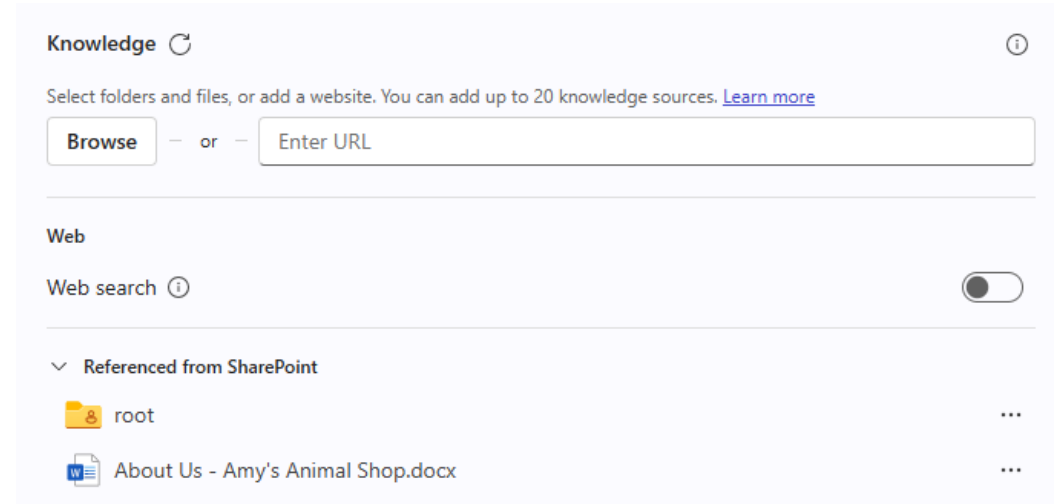
- *After providing a suggestion, ask if it meets the user's needs or if adjustments are needed.*
- *Offer further assistance with related tasks.*
- *Summarize what was achieved during the interaction.*
- *Suggest next steps or provide additional resources.*
- *Thank the user for their time and confirm that the agent is available for future assistance.*

# Define Knowledge

- Knowledge sources are the foundation your agent works off of.
- These can include:
  - Specific documents, and
  - SharePoint sites.

## Pro Tip:

When your agent is grounded on work data, such as documents or SharePoint sites, these messages are billed to your organization. If your team members have a standalone 365 Copilot license, these messages are included. Otherwise, they will need a separate license for metered billing. [See pricing for more info.](#)



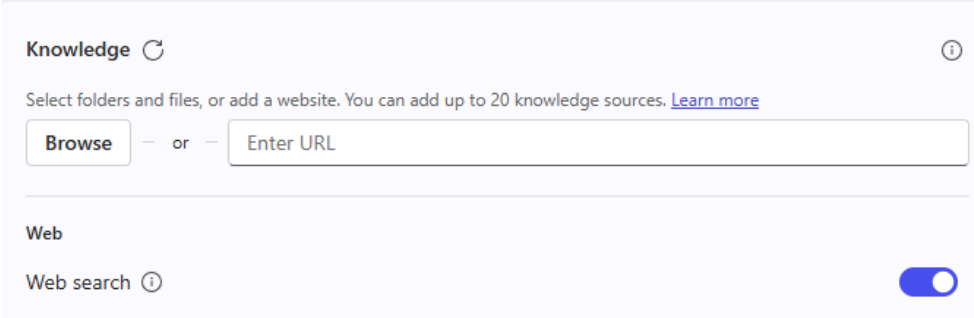
# Define Web Content

Web content can be toggled on or off:

- When toggled on, your agent can access publicly available information on the web.
- The agent will provide citations for the information it retrieves.
- Always verify the information provided by your agent to ensure accuracy.

## Pro Tip:

If your agent is only grounded on the web, then messages with these agents are free to use. However, err on the side of caution when using web data because you are opening the doors to the internet.



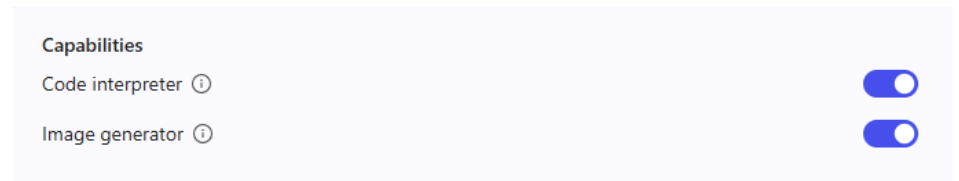
The screenshot shows the 'Knowledge' section of the Microsoft Copilot interface. It includes a 'Knowledge' header with a refresh icon and an information icon. Below the header, there is a text prompt: 'Select folders and files, or add a website. You can add up to 20 knowledge sources. [Learn more](#)'. A 'Browse' button is followed by 'or' and a text input field labeled 'Enter URL'. Below this, the 'Web' section is visible, featuring a 'Web search' label with an information icon and a blue toggle switch that is currently turned on.

# Define Capabilities

Capabilities unlock additional functionality for your agent.

For example:

- Code generation uses Python to solve complex problems, and
- Image generation allows for creating images.



## Pro Tip:

Include capabilities in your instructions. For example, if you want images to be minimalistic and modern, mention that in your description.

# Starter Prompts

- Starter prompts allow your team to quickly engage with an agent.
- We can define up to six starter prompts.
- When creating starter prompts, think of FAQs:

- *For example, an Agent helping a HR manager, some common questions from employees could be:*
  - *How do I schedule vacation?*
  - *What happens when I take a sick day?*

## Pro Tip:

Align your starter prompts with the skills component of your instructions. See the [skills section](#) for a breakdown and examples.

### Refund Policies

Can you tell me about the refund policies?

### Centralized FAQ


Where can I find the centralized FAQ?

### Support Tickets Help

How can I get help with my support ticket?

# Thank You for Joining Us!



- **Pro Tips:** Remember to apply the 9 pro tips  discussed for effective Copilot Agent creation.
- **Test Agent:** Once your agent is built, you will need to test it out for accuracy and push the boundaries to ensure it responds the way you want it to. Keep in mind [safe practices](#).
- **Troubleshoot Agent:** For an example of troubleshooting your agent, check out this [video here](#).

Stay connected for future updates and resources.

[YouTube Channel: Office Skills with Amy](#)