The Copilot Chat Adoption Agent Deployment Guide

Deployment of Package

Steps to Import the Agent Package in Copilot Studio

1. **Download the ZIP file**
   - download the shared file (e.g., CopilotAdoptionAgent_1_1_0_2.zip) to your local machine.

2. **Open Copilot Studio and Navigate to Solutions**
   - In the left-hand navigation pane, click the **three dots (More)** and select **Solutions**.

3. **Start the Import Process**
   - Click **Import Solution** at the top of the Solutions page.

4. **Select the ZIP File**
   - In the import dialog, click **Browse**, then select the downloaded ZIP file without extracting it.

5. **Adjust Advanced Settings**
   - Expand the **Advanced Settings** section and **uncheck the box** that appears there (Doug mentioned this is important for cross-tenant ingestion).

6. **Proceed and Import**
   - Click **Next**, then **Import**.
   - The system will process the solution and ingest the agent along with its associated Power Automate flows. This step may take a few minutes.

7. **Verify Connection Resource**
   - After import completes, check the **connection resource** settings to ensure they identify your environment (not the original tenant). This ensures the agent works properly in your setup.

8. **Test the Agent**
   - Use the **Test Panel** in Copilot Studio to run the agent. For example, trigger the email scheduler to confirm it works as expected before deploying widely.

✅ **Tip:** This agent is designed for running email campaigns (tips and tricks) and doesn't need to be published to Teams or chat unless you want broader access. You have full control to edit schedules or flows in Power Automate if needed.

Testing the Agent

Note: User running agent must have a M365 Copilot License.

Steps to Test Run the Agent
1. **Open Copilot Studio**
   o Navigate to the agent you just imported, the ***Copilot Adoption Agent***
2. **Use the Test Panel**
   o In the Copilot Studio interface, type the command:
      start email (or **test start email** if you want to explicitly run the test mode).
3. **Confirm Test Mode**
   o The system will prompt: *"Looks like you want to start the test experience of Copilot Adoption Agent."*
   o Click **Yes** to proceed.
4. **Set Delay Between Emails**
   o Enter the delay in **minutes** (e.g., 1 for one-minute intervals between emails).
   o This is useful for simulating multiple campaign emails quickly.
5. **Choose Campaign Type**
   o Specify whether the test is for **Chat** users or **Paid Copilot** users.
6. **Enter Recipients**
   o Provide email addresses (or a distribution list) in **semicolon-separated format** (e.g., user1@example.com;user2@example.com).
7. **Select Content Level**
   o Choose **Beginner**, **Intermediate**, or **Advanced** for the tips included in the emails.
8. **Optional Settings**
   o **Champions:** Decide if you want to identify champions (they'll get separate emails encouraging them to support others).
   o **Executive Sponsor:** Choose whether to generate a draft email for an executive sponsor to send out.
9. **Allow Connector Access**
   o When prompted, click **Allow** to enable the connection resource for sending emails.

10. **Start the Test**
    - o Confirm the final prompt. The agent will begin sending test emails at the interval you specified.

✅ **Tip:** For a quick simulation, Doug suggested setting the delay to **1 minute** and sending emails to yourself or a small group. This way, you can preview the experience without waiting days.

Running the Agent for actual Wider Audience (non test)

✅ **Steps to Run the Copilot Adoption Agent for Real**
1. **Open Copilot Studio**
    - o Navigate to the agent you just imported, the *Copilot Adoption Agent*
2. **Start the Email Scheduler**
    - o In the agent's chat interface, type:
      start email
      (Do **not** include "test" — that's only for test runs.)
3. **Confirm Start**
    - o The agent will prompt you to confirm starting the full adoption campaign. Click **Yes**.
4. **Choose Campaign Type**
    - o Select whether the campaign is for **Copilot Chat** users or **Paid Copilot** users.
5. **Enter Recipients**
    - o Provide the distribution list or email addresses in **semicolon-separated format** (e.g., user1@example.com;user2@example.com).
6. **Select Content Level**
    - o Choose **Beginner**, **Intermediate**, or **Advanced** for the tips included in the emails.
7. **Optional Settings**
    - o **Champions:** Decide if you want to identify champions (they'll get separate emails encouraging them to support others).

- o **Executive Sponsor:** Choose whether to generate a draft email for an executive sponsor to send out.
8. **Allow Connector Access**
   - o When prompted, click **Allow** to enable the connection resource for sending emails.
9. **Campaign Duration**
   - o The full campaign runs automatically for **28 days**, sending emails on **Tuesday, Wednesday, and Thursday at 10:00 AM Central Time** (default schedule).
   - o You can edit these times later in **Power Automate flows** if needed.
10. **Monitor Progress**
    - o Use Copilot Studio or Power Automate to check status and logs. You can stop or adjust the campaign anytime.

✅ **Key Difference from Test Mode:**
- Test mode uses short intervals (e.g., 1 minute) for quick previews.
- Full mode uses the default schedule and runs for 4 weeks without further input. User will receive 3 emails a week (Tues, Wed, Thur) for four weeks.

FAQ

1. What is the purpose of this agent?
The agent is designed to **educate users** on Copilot features (both paid and chat versions) by sending scheduled email campaigns with tips and prompts to encourage adoption.

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2. How long does the campaign run and what is the schedule?
- The campaign runs for **28 days**.
- Sends **3 emails per week** (Tuesday, Wednesday, Thursday at **10:00 AM Central Time**).
- Each cycle includes **12 emails** with progressively advanced prompts.

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3. What's the difference between test mode and full run?
- **Test Mode:** Use test start email for quick simulation (e.g., 1-minute intervals).
- **Full Run:** Use start email for the actual campaign schedule (28 days).

4. How do I specify recipients?

Provide email addresses or distribution lists in **semicolon-separated format** (e.g., user1@example.com;user2@example.com).

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5. What content levels are available?

You can choose:

- **Beginner**
- **Intermediate**
- **Advanced**
  Prompts become more complex as the campaign progresses.

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6. Are there optional features?

Yes:

- **Champions:** Sends separate emails to designated champions encouraging them to support others.
- **Executive Sponsor:** Generates a draft email for leadership to endorse the initiative.

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7. Do I need to grant permission?

Yes. When prompted, click **Allow connector access** to enable email sending.

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8. Can I customize the schedule or content?

Yes. After import, you have **full control**:

- Edit **Power Automate flows** to change email timing or content.
- Adjust campaign logic if needed.

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9. Do I need to publish the agent to Teams?

No. It's intended to run from **Copilot Studio**, but you can publish if you want broader visibility.

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10. How is governance handled?

All agents (including chat-created ones) appear in the **Microsoft Agents 365 admin portal** for oversight. Admins can block or approve agents before wider rollout.