Copilot Adoption Agent – README Document

Overview

The **Copilot Adoption Agent** (1.1.0.4) is a packaged Copilot Studio solution designed to help organizations accelerate adoption of **Copilot Chat** and **Microsoft 365 Copilot** through automated, structured communication campaigns.

This agent delivers a complete, ready-to-run **30-day email adoption program**, sending users three targeted emails per week that progressively build Copilot skills at the **Beginner**, **Intermediate**, and **Advanced** levels.

While the agent includes optional enablement guidance for administrators, its primary purpose is to **automate adoption communications**, not to manage licensing or provisioning.

What This Agent Does

- Automates delivery of a **30-day Copilot adoption email campaign**

- Sends **3 emails per week** (**Tuesday, Wednesday, Thursday** at **10:00 AM Central Time**)

- Sends emails **from the authenticated user's mailbox** who is entering the request in the agent experience (author).

- Provides **prewritten email templates** for both Copilot Chat and Microsoft 365 Copilot

- Supports **Beginner**, **Intermediate**, and **Advanced** learning tracks

- Includes test flows to validate environment configuration

- Offers optional Q&A for user enablement and adoption recommendations leveraging the Enablement Guides for both products as the knowledge references.

Included in This Solution

Core Components

- **Copilot Studio Agent**
  The conversational interface used to configure campaigns, select product type, choose skill level, and define the target audience.

- **Prebuilt Prompts & Logic**
  All decision logic, branching, and campaign configuration steps required to run the adoption program.

- **Email Template Library**
  Fully authored communication templates for:

    o Beginner

    o Intermediate

    o Advanced

    For both **Copilot Chat** and **Microsoft 365 Copilot**.

Power Automate (Agent) Flows – 12 Total

The solution includes **12 Power Automate flows**, grouped into **Test** and **Production** sets.

6 Test Flows (Environment Validation)

These flows allow administrators to validate:

- Email formatting and rendering

- Template selection

- Routing to the target distribution lists

- Authentication of the sender's personal mailbox

- Variable timing logic for testing, with entering a delay in minutes to verify emails

- Overall readiness before launching a live campaign

6 Production Delivery Flows

These flows execute the live 30-day campaign:

- Deliver emails on **Tuesday, Wednesday, Thursday at 10:00 AM Central.** This initial delivery will start at the next planned window based on agent engagement.

- Use the selected product (Copilot Chat or Microsoft 365 Copilot)

- Use the selected skill level (Beginner, Intermediate, Advanced)

- Send **from the authenticated user's mailbox**

- Reminder emails with instructions to track adoption progression

- The individual Agent Flows can be reviewed at any time to see the progress of the delivery.

Each production flow corresponds to a specific product + skill level combination, keeping campaigns isolated, predictable, and easy to manage. Multiple campaigns can be run at the same time. All campaigns are independent of each other.

Prerequisites & Required Roles

Environment Requirements

- A Microsoft 365 tenant with **Copilot Studio enabled**

- Access to a **Dataverse environment** (default or custom)

- A user mailbox capable of sending outbound email (Microsoft 365 author's account)

Role Requirements

To import and configure the solution, you must have <u>one</u> of the following roles for the target environment that the Copilot Adoption Agent will be ingested into:

- **Environment Admin**

- **System Administrator**

- **Copilot Studio Administrator**

- **Power Platform Admin**

To send emails from the author's account from the agent, the author must also:

- Authentication of the Outlook connector to the connector resource (happens during ingestion).

- Be licensed for Microsoft 365 Copilot.

- Have permission to send to the target distribution list.

Importing the Copilot Adoption Agent into Copilot Studio

1. Download the Solution Package

Obtain the .zip solution file from this repository's release or solution folder.

2. Open Copilot Studio

Navigate to:
https://copilotstudio.microsoft.com

3. Select Your Environment

Choose the Dataverse environment where the agent should be installed.

4. Import the Solution (Critical Advanced Settings Step)

- Go to **...** on left panel, and select **Solutions**

- Select **Import solution**

- Upload the .zip file

- When the import wizard appears, expand **Advanced Settings**

- **Uncheck** the option:
  "Enable all workflows and connections included in the solution"

***This step is **critical**.
***Unchecking this box prevents the 12 Power Automate flows from activating before your mailbox authentication is confirmed.

- Proceed with the import!

5. Verify Connection Resources (Important)

Once the solution appears in your Solutions list:

1. Open the **Copilot Adoption Agent** solution.

2. Select **Connection Resources**.

3. Locate the connection named **cr_Outlook**.

4. Ensure **author's account** is bound to this connection resource.

It should bind automatically, but verifying this ensures the agent will send emails from your mailbox without errors.

6. Open the Copilot Adoption Agent

Once the installation is completed, the author can visit Inside the agent, the author will work with the chat interface to:

- Select the product (Copilot Chat or Microsoft 365 Copilot)

- Select the skill level (Beginner, Intermediate, Advanced)

- Provide the target distribution list

- Confirm the campaign schedule

7. Run Test Flows (Recommended)

Use the six included test flows to validate:

- Email formatting

- Routing

- Permissions

- Template accuracy

8. Activate the Production Campaign

Once validated, start the production flow for your selected product and skill level. Emails will automatically be sent on the defined cadence for 30 days **from author's mailbox**.

**While you can choose to formally publish the Copilot Adoption Agent following Microsoft processes (Key concepts - Publish and deploy your agent - Microsoft Copilot Studio | Microsoft Learn), this is technically not required. If the person ingesting the agent will be the same one operating it, then you can leverage the Test experience in the Agent while in Copilot Studio to issue commands.

Operating the Copilot Adoption Agent

The agent is designed to be simple and command-driven. There are **two primary commands** you will use:

1. TEST start email scheduler

Use this command when you want to run the **test version** of the campaign.

This mode allows you to:

- Validate email formatting

- Confirm routing to the distribution list

- Test your mailbox authentication

- **Control the delay between emails** (in minutes)

    o Example: send test emails every 5 minutes instead of waiting days

This is the recommended first step before running a production campaign.

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2. start email scheduler

This command launches the **full production 30-day campaign**, using:

- The selected product (Copilot Chat or Microsoft 365 Copilot)

- The selected skill level (Beginner, Intermediate, Advanced)

- The configured distribution list (recommended)

    o Individual emails addresses can be used, but more than one requires a semi-colon (;) used between addresses to meet Outlook structure.

- The fixed schedule of **Tue/Wed/Thu at 10:00 AM Central**

Once started, the campaign runs automatically for 30 days.

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3. Ask questions or request recommendations

Beyond campaign execution, the agent can also answer:

- Copilot adoption best practices

- Tips for onboarding users

- Guidance on communication strategy

- General Copilot enablement questions

This makes the agent useful both as a campaign engine and an adoption advisor.

Email Delivery Notes

- Emails are sent **from the authenticated author 's mailbox**

- Campaigns run independently for each product/skill level

- Multiple campaigns may run in parallel

- Timing is fixed to **Tues/Wed/Thurs at 10:00 AM Central Time**

Customization Options

Given you have an unmanaged Agent, Admins may optionally customize:

- Email html templates (within Agent Flows, manually)

- Timing and cadence (within Agent Flow, manually)

- Branding or formatting (requires internet accessible storage and html editing)

- Additional enablement content

Support & Troubleshooting

If emails fail to send:

- Verify Outlook connector is connected (connectors can become unconnected over time with lack of usage)

- Ensure the distribution list accepts automated or bulk senders

- Validate that test flows successfully

Current release: 1.1.0.4 – Corrected incorrect product reference in emails.