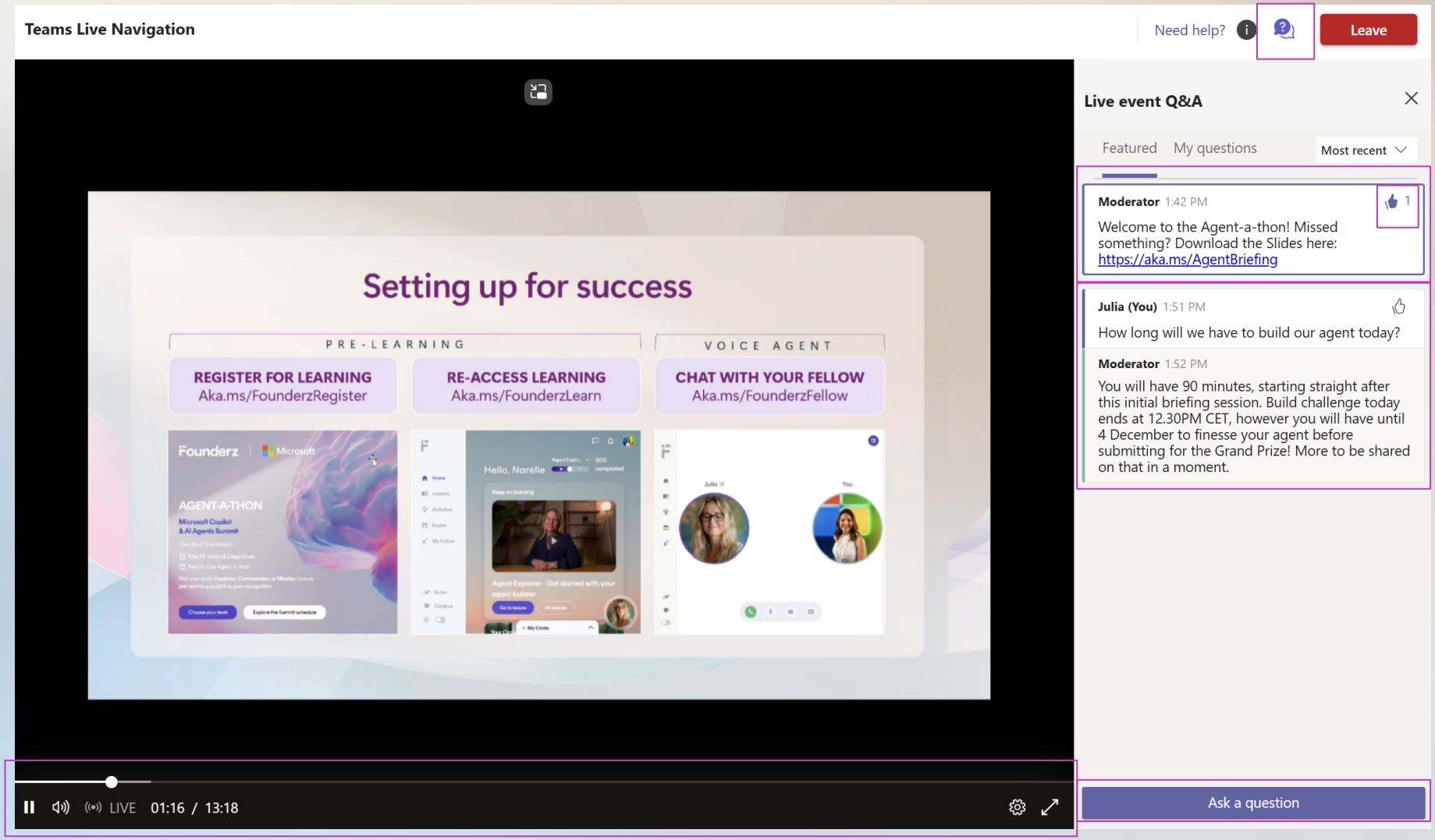
Microsoft 365 Copilot

Welcome to the Agent-a-thon, Explorers!

Navigating Teams



How we will interact

- Q&A is enabled

Questions

- If you like an announcement or a question raised by the audience give it a thumbs up!
- Use the Ask a question box at bottom of screen
- Your question will be marked purple
- The experts response will be marked green
- Use the video controls to navigate to anything you've missed

Meet your hosts

Narelle Stefanac
Global Skills Excellence Lead
Microsoft

Andrea Fogel
Senior Global Solution Architect AI Business Solutions AI Workforce, Microsoft

Pau Garcia-Mila
Co-Founder & Co-CEO
Founderz

Meet your Microsoft MVPs

Hanna Engel
AI Lead
Azelis

Johnson de Souza Cruz
Senior Microsoft Consultant
Reply

Mohamed Azarudeen Z
Associate Consultant
KPMG

Muhammad Samiullah
Solution Engineer
Mazik Global Inc

Nilüfer Doğan
AI Engineer
PEAKUP

Olajumoke Toriola
Chief Technology Officer
Ha-Shem Limited

Renato Romao de Souza
Co-Founder & CTO
Belake.ai

Sebastian Sieber
Global Director Technology
proMX

Vesa Nopanen
Principal Consultant
Sulava MEA

How today will work

10:00 – 11:00 CET

01

BRIEFING

- Setting up for success
- Learning Recap
- Key steps to building an agent
- What to do if you get stuck

11:00 – 12:30 CET

02

BUILD

- Build your agent
- Refer to your pre-learning
- Use your Copilot Voice Agent / ‘Fellow’
- Ask our MVPs in Q&A

12:30 – 13:00 CET

03

CELEBRATE

- Initial prize winners announced
- Overview of how to enter your agent into the grand prize.
- Key dates

Setting up for success

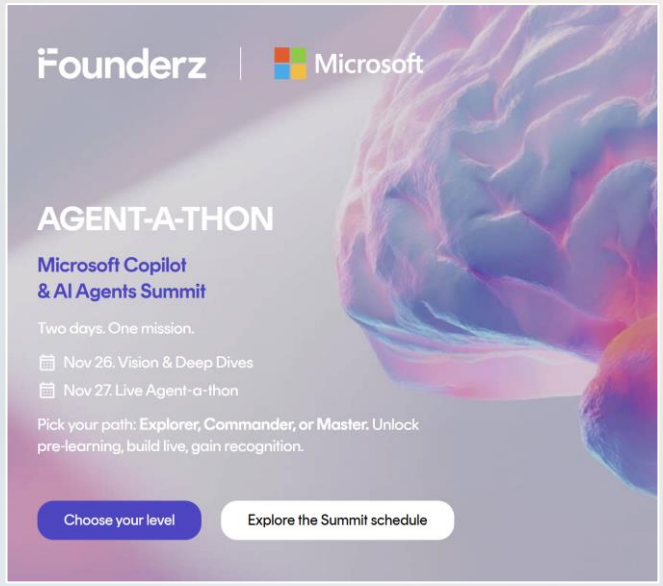
PRE-LEARNING

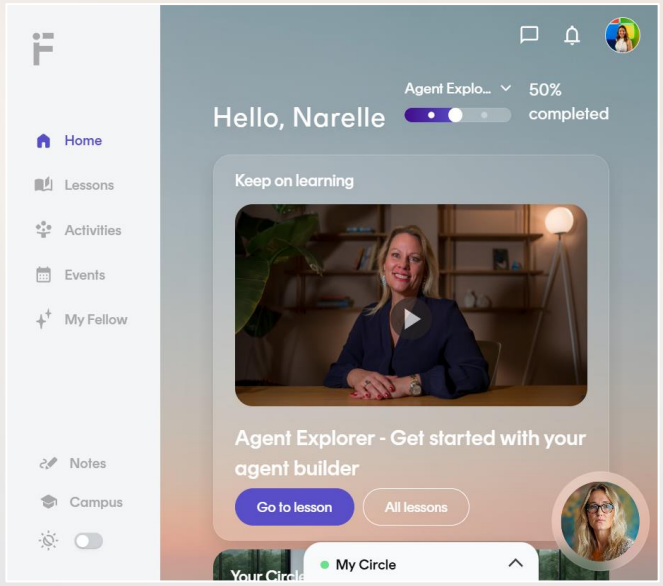
REGISTER FOR LEARNING
Aka.ms/FounderzRegister

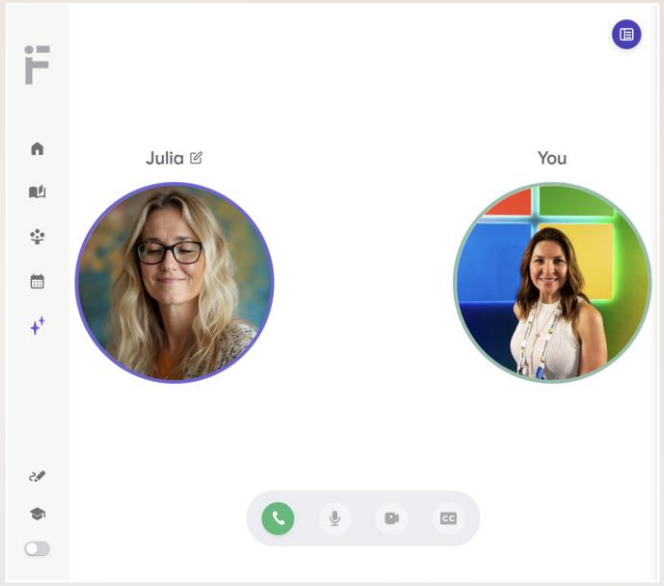
RE-ACCESS LEARNING
Aka.ms/FounderzLearn

VOICE AGENT

CHAT WITH YOUR FELLOW
Aka.ms/FounderzFellow







12 steps to building your AI Agent

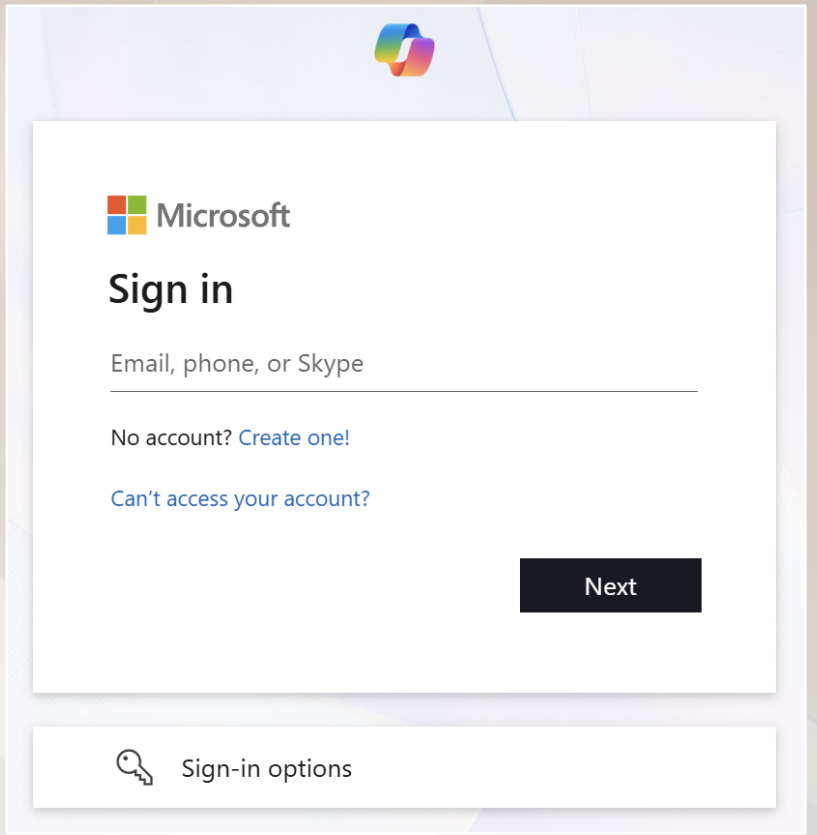
Within the Microsoft Copilot Chat interface (no licence required)

Andrea Fogel
Senior Global Solution Architect AI Business Solutions
AI Workforce, Microsoft

Step 1

- Go to one of these three options:
  - **microsoft365.com/chat**
  - **Office.com/chat**
  - **Microsoft Teams (via the Copilot app)**

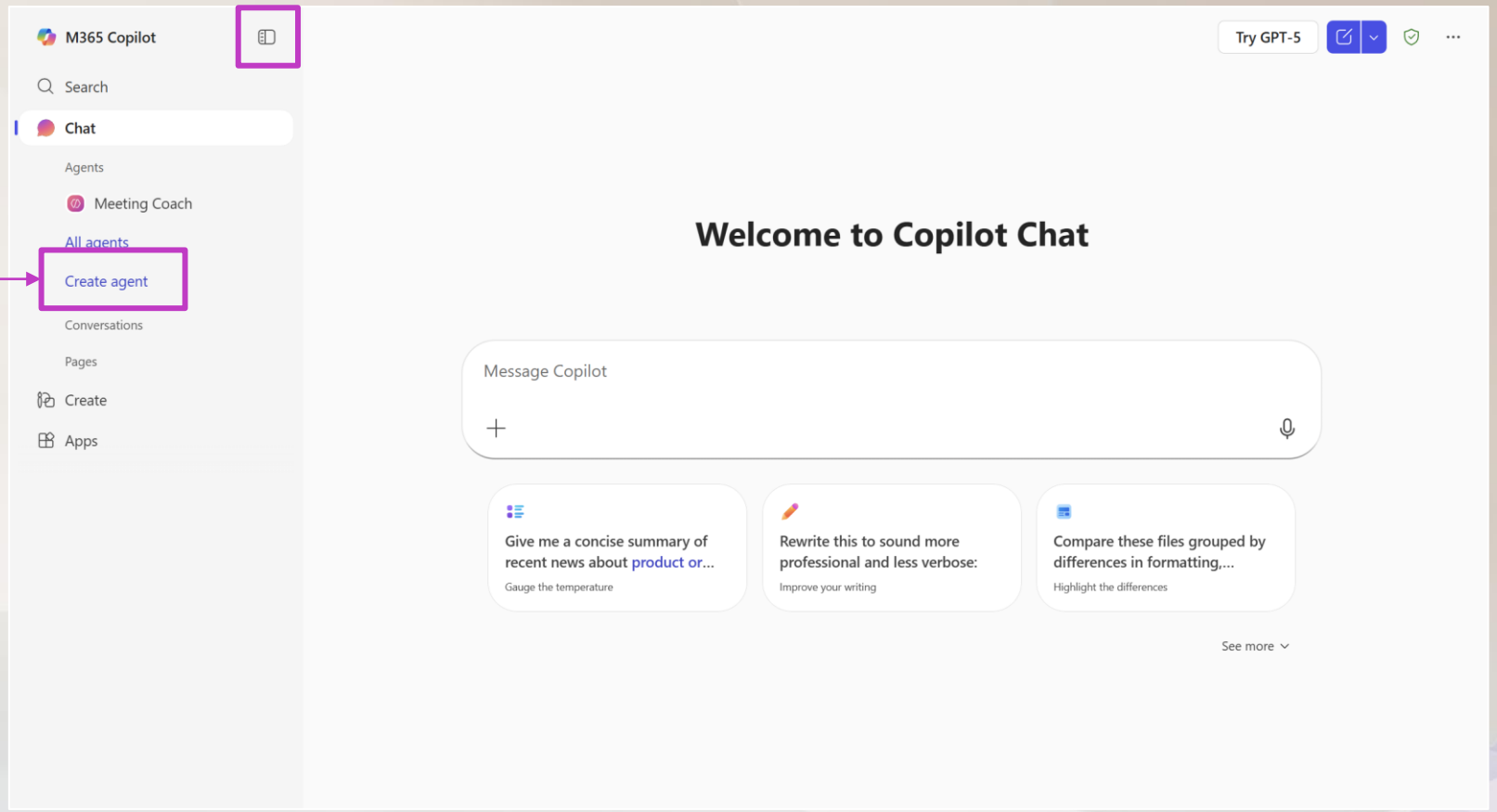
- **Sign in** with your Microsoft 365 account



Note: *To create a Copilot Agent via the Microsoft Chat interface you require a Microsoft 365 Account. If you do not have this you can still complete the training on Founderz Platform, but you will not be able to build an agent.*

Step 2

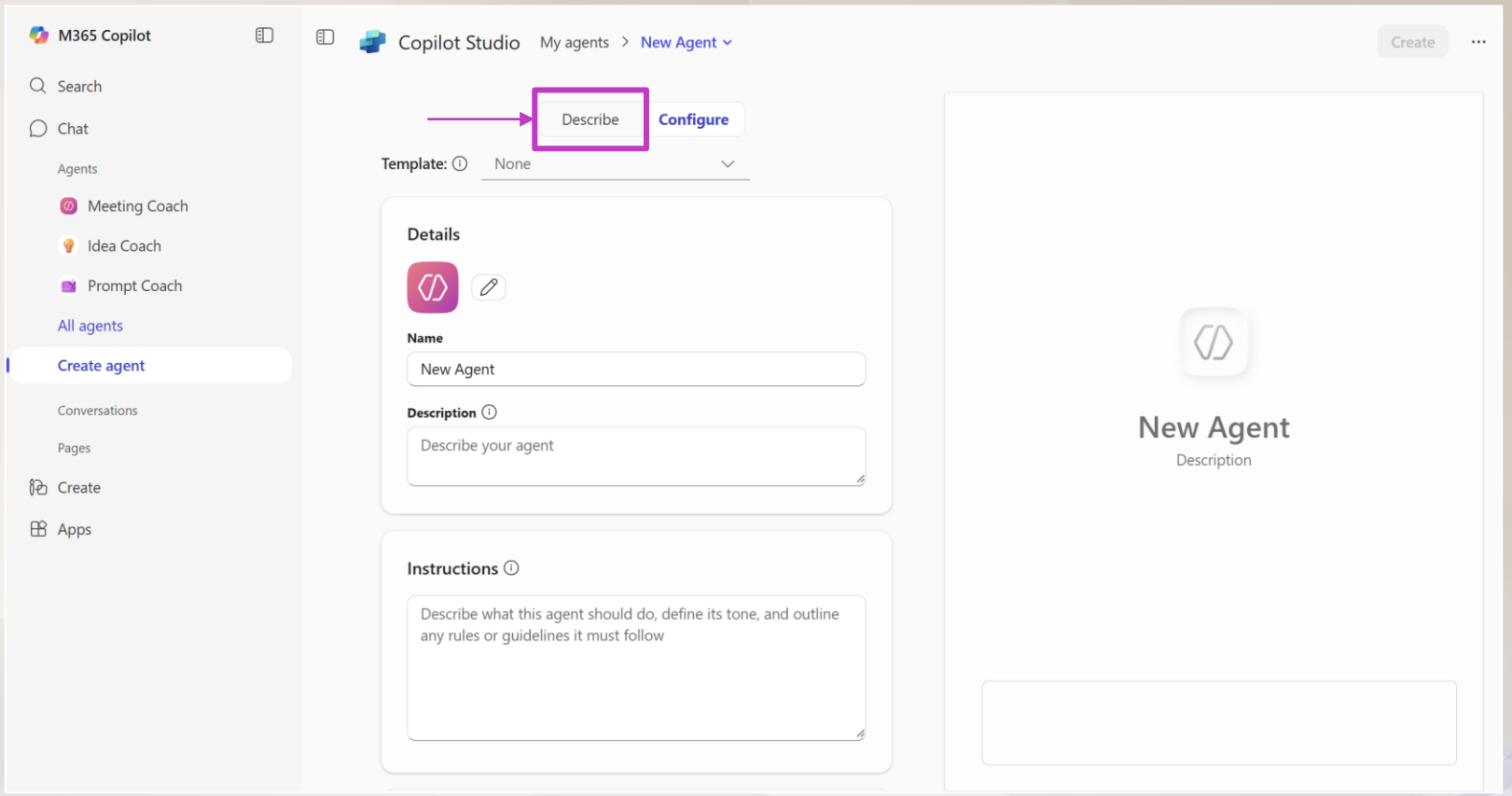
- Select **Create agent**



Note: *If you do not have this option it means your IT Team / Administrator, has disabled your access to this capability. You will need to request access via your IT Team to be able to build an agent.*

Step 3

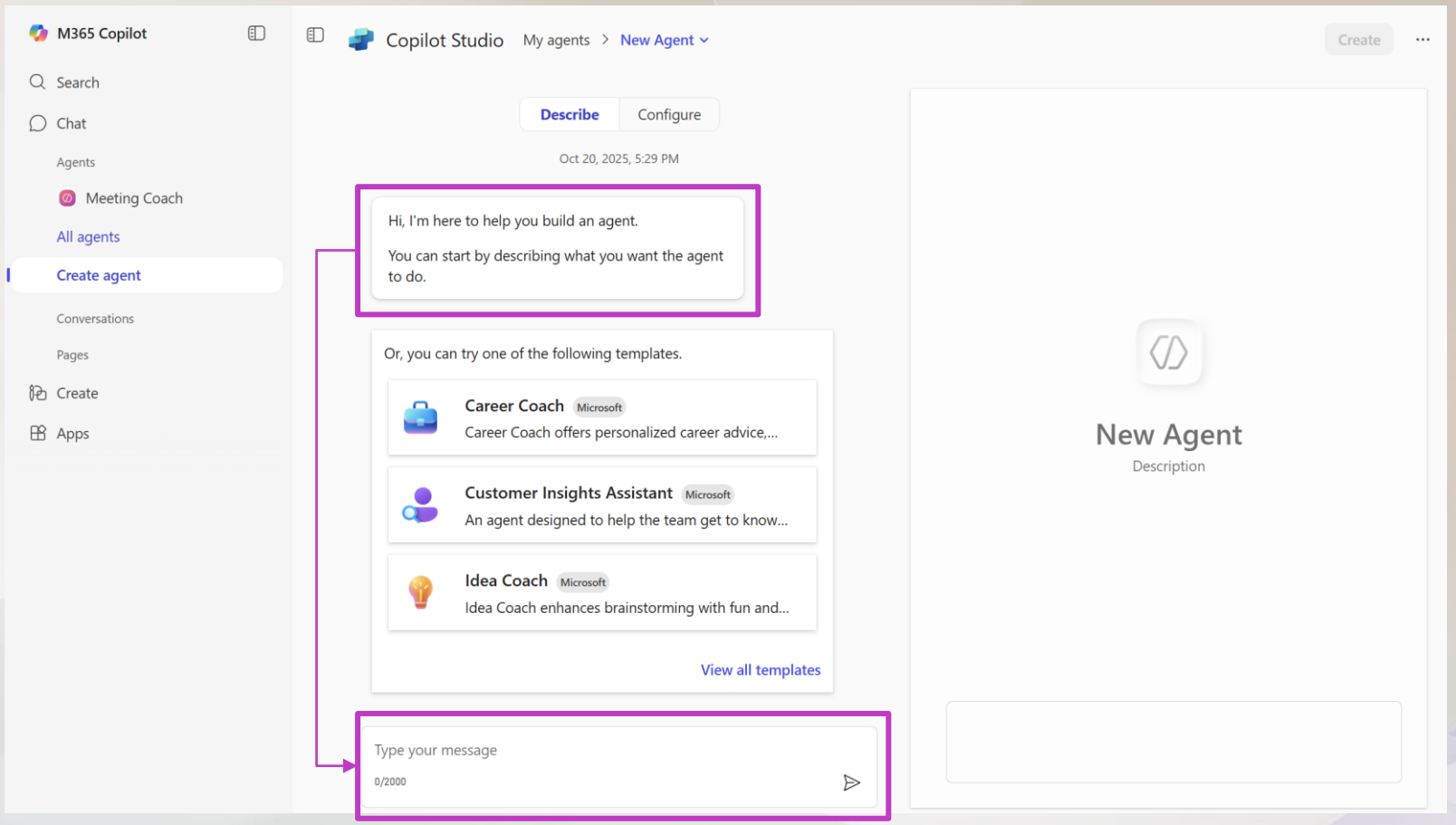
- Toggle to **Describe**



Note: *You can stay on the Configure tab if you prefer, but then you have to do all of the thinking. If you toggle to Describe and follow the prompts, the agent builder will draft content for each field for you.*

Step 4

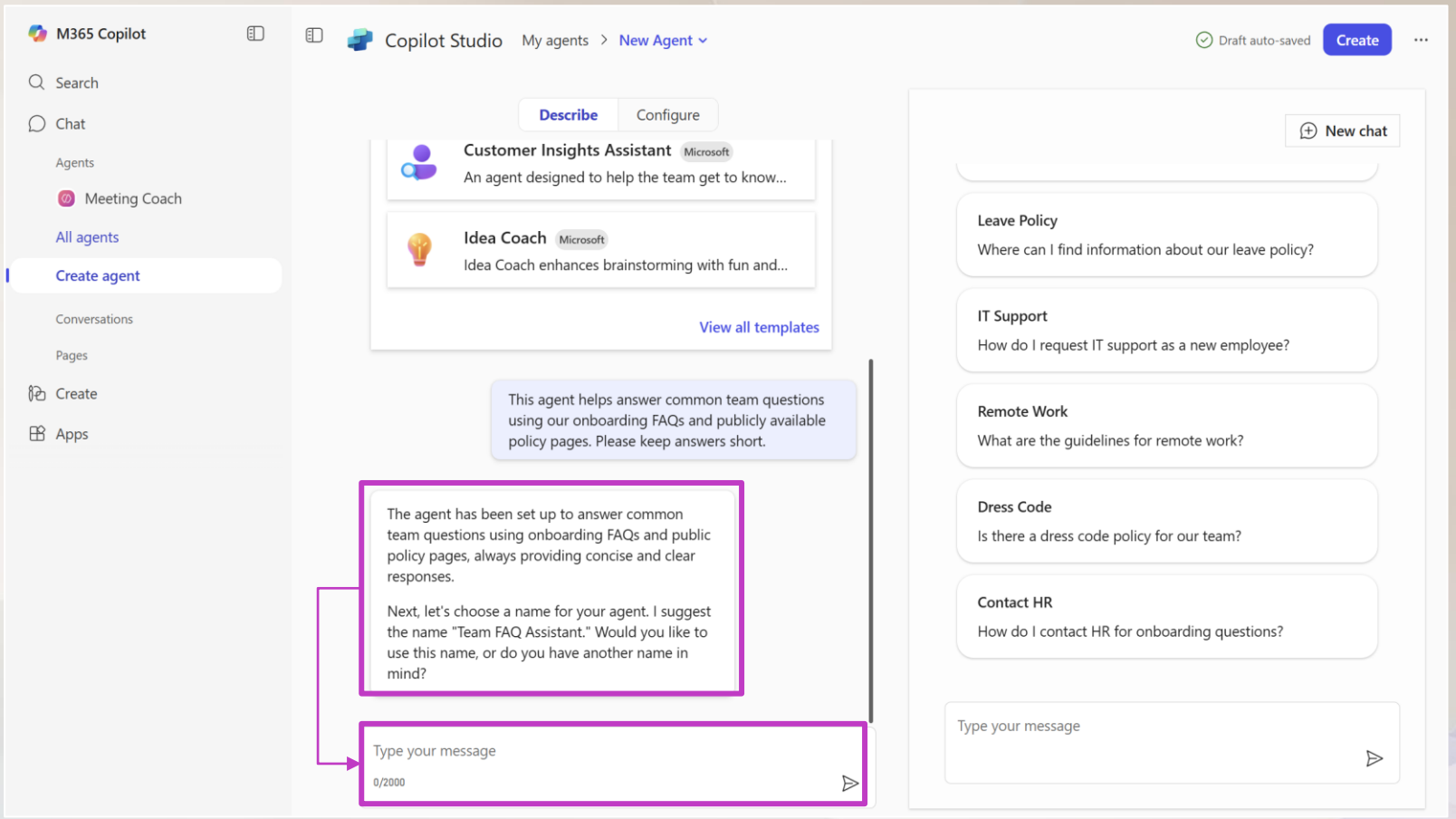
- **Describe** what you want the agent to do



Agent Description Example: *This agent helps answer common team questions using our onboarding FAQs and publicly available policy pages. Please keep answers short.*

Step 5

- **Name** the agent

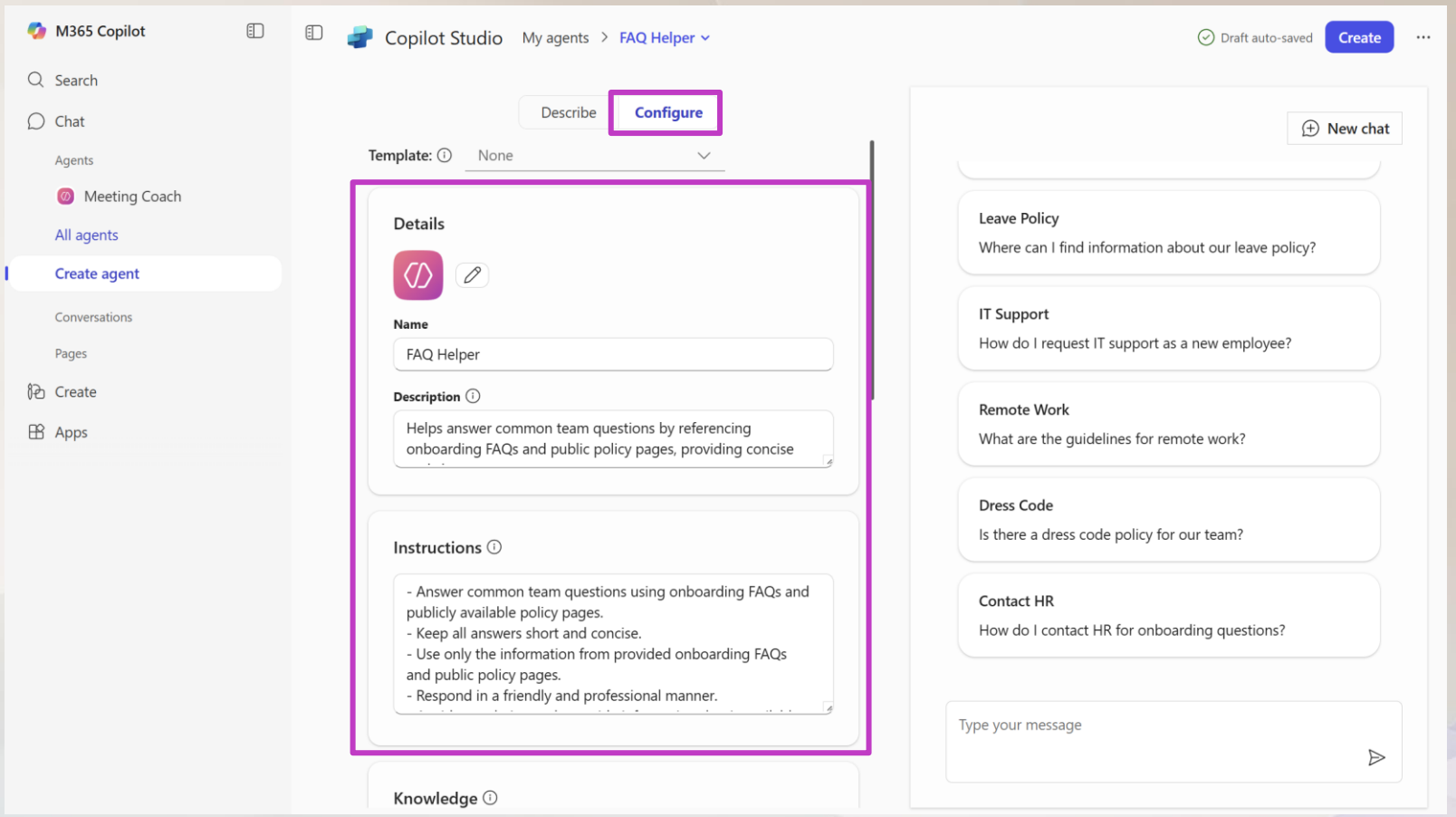


TIP: *You can just say 'yes' if you would like to keep what has been suggested. Or type the name of your agent.*

Name Change Example:
FAQ Helper

Step 6

- Toggle to **Configure**
- **Review & modify** each field



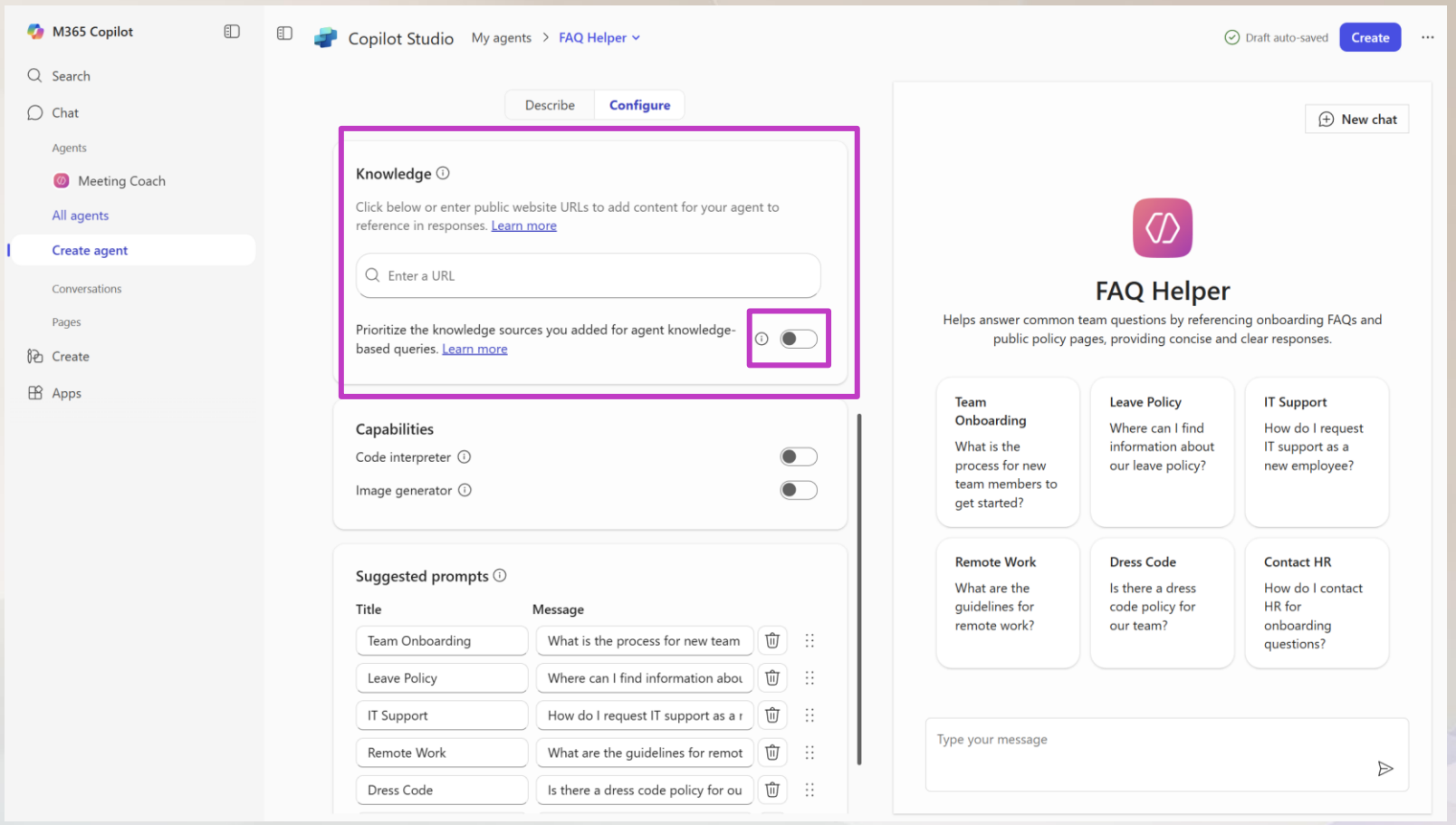
TIP: *In the instructions we recommend adding a style block – a set of clear rules for how your agent should respond.*

Extra Instructions Example:

- *Answer in less than 120 words*
- *Answer "I don't know" if you are unsure*
- *Cite the source*
- *Always end with "I hope this was helpful to you"*

Step 7

- In the “Knowledge” section, **add a public website**
- **Toggle** the ‘Prioritize the knowledge sources you added…’ to **on**.



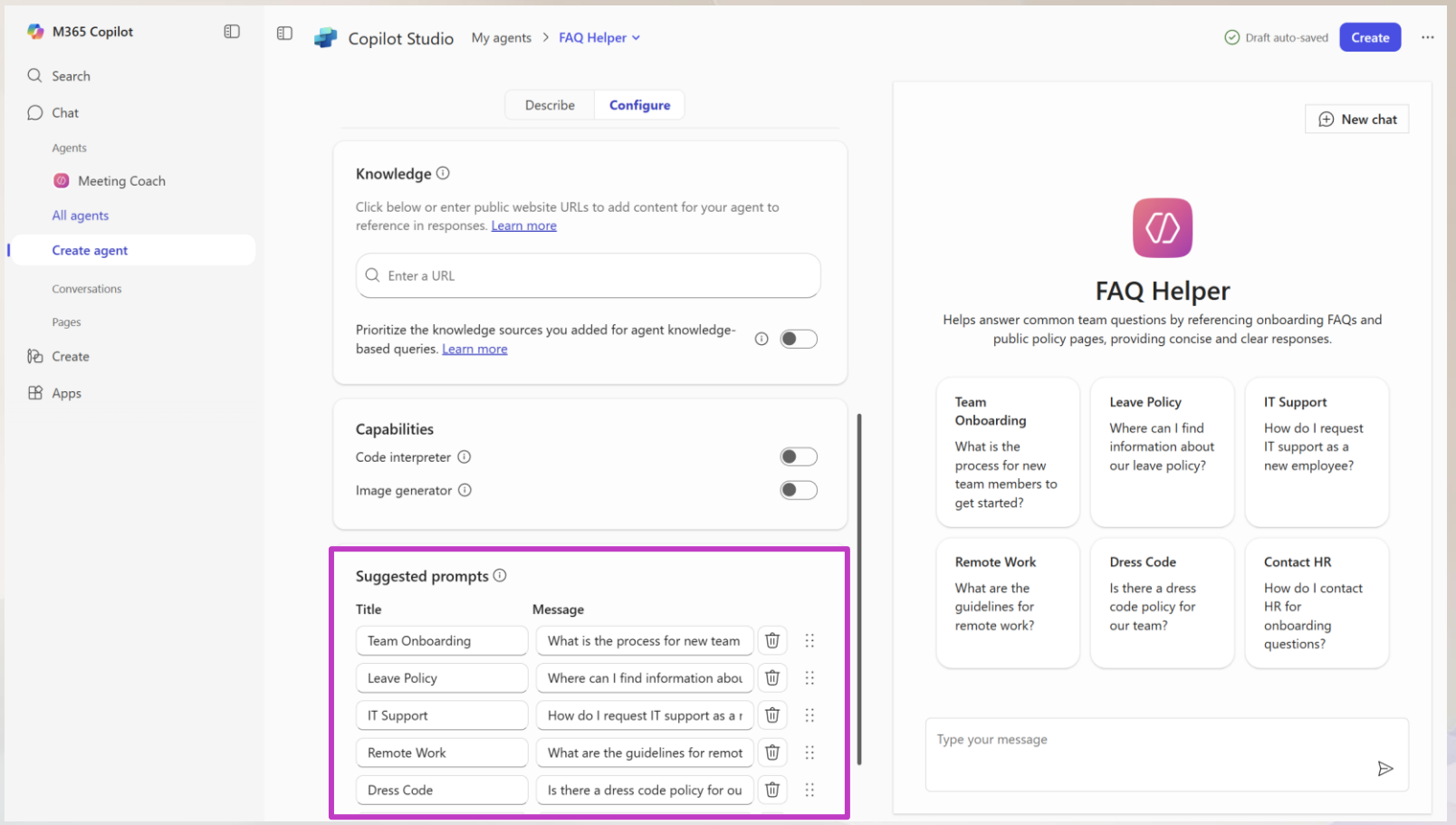
TIP:

- *Public websites are a simple and cost-free knowledge source for your agent. You can use up to 4 public website.*
- *Remember to toggle it on.*

Example public website:
https://www.microsoft.com/human-resources

Step 8

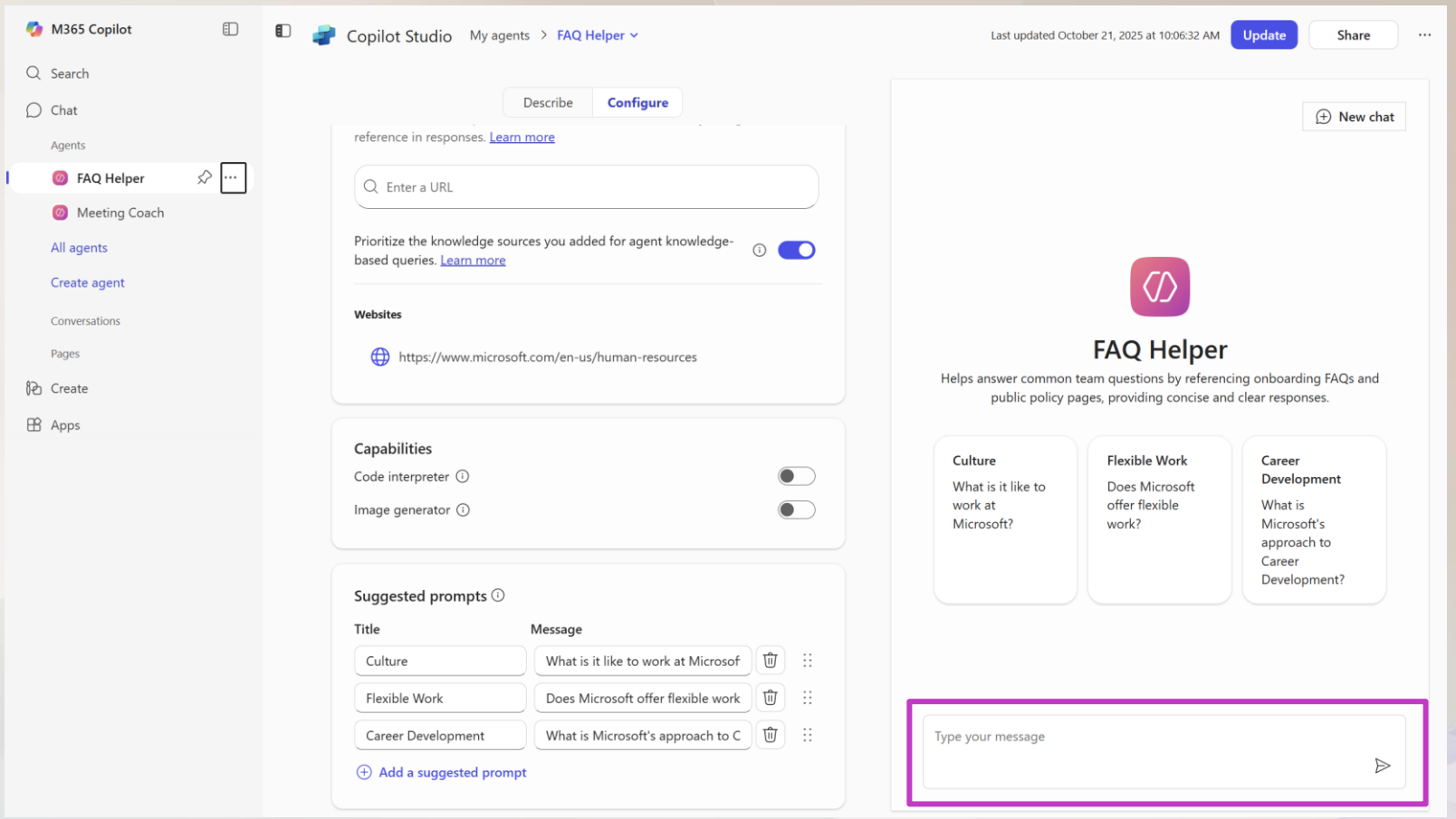
- **Review, modify, remove or add** Suggested Prompts



TIP: *Sometimes the AI generated title is too generic, rename these to something that is more relevant to the user.*

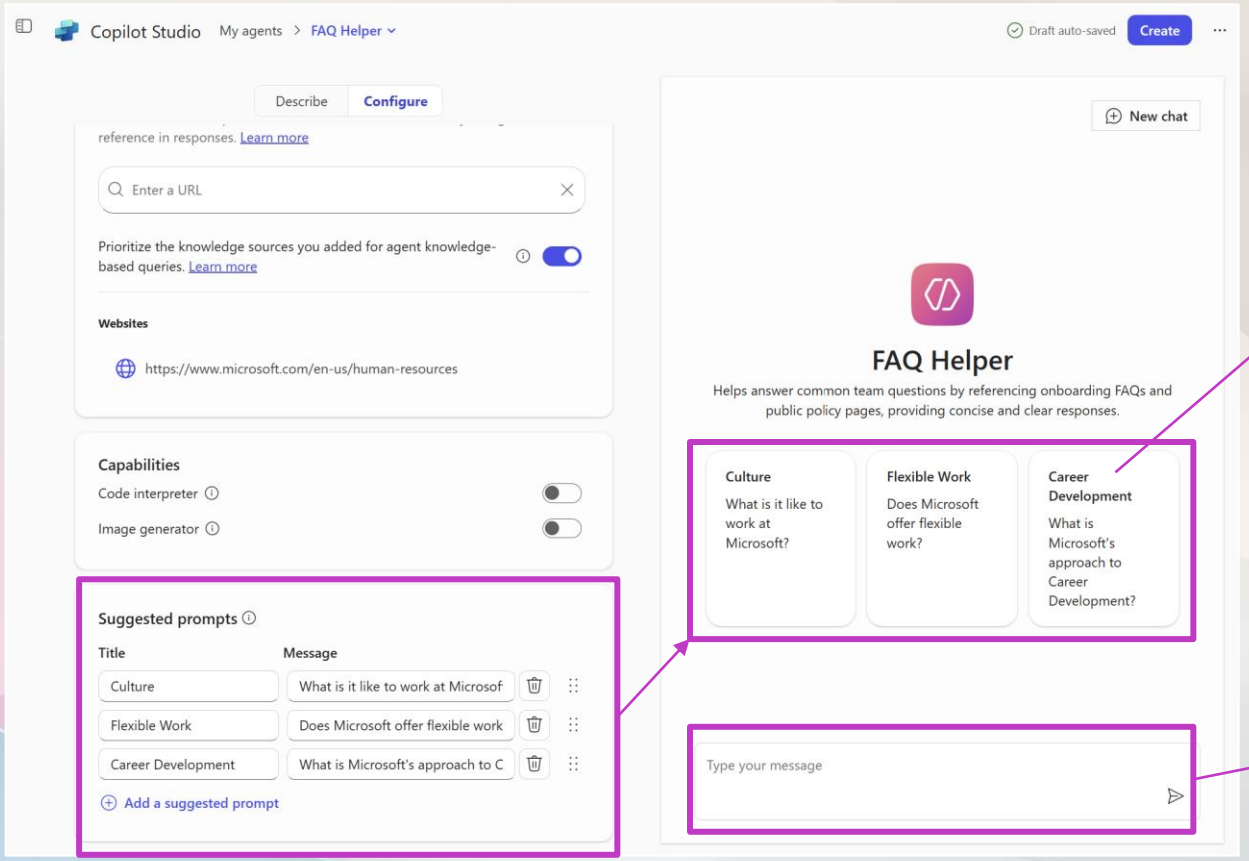
Step 9

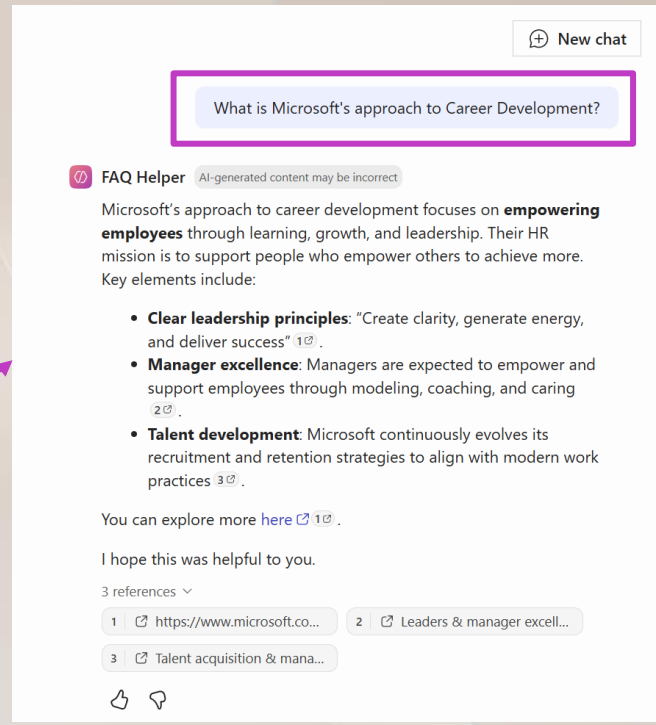
- **Test** your agent by typing questions into the message box

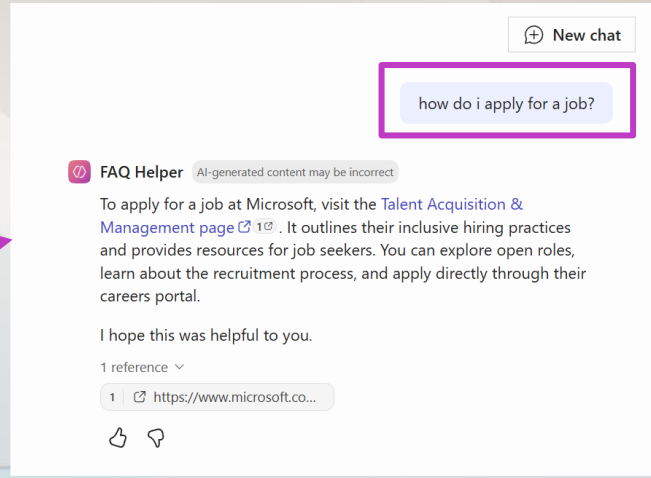


TIP: *If your agent does not provide the answers you want it to, that is your flag to fine tune in the configure section by either adding or refining the knowledge sources used or editing the instructions on how the agent should respond.*

Step 9 (cont)

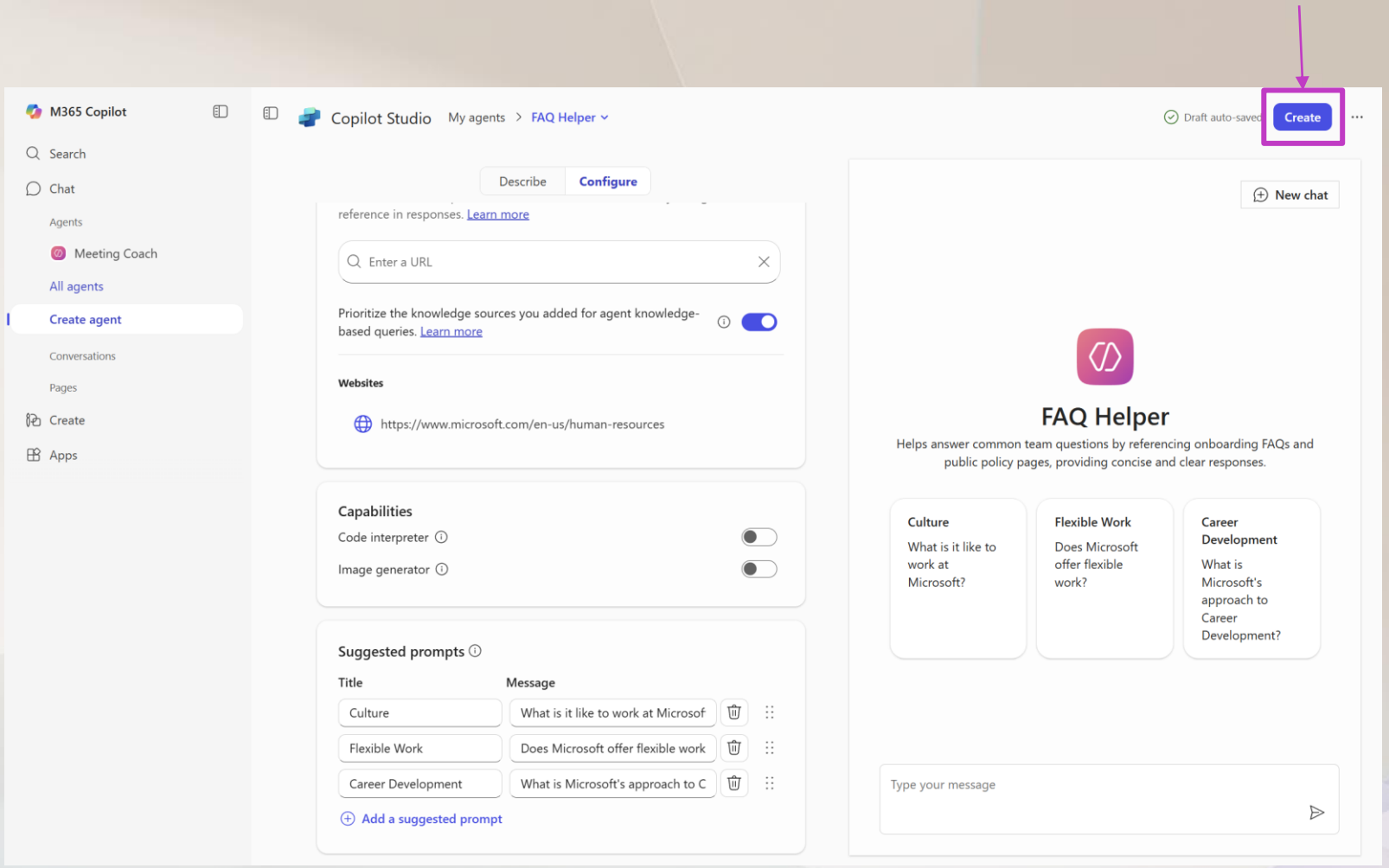

Copilot Studio
My agents
FAQ Helper
Draft auto-saved
Create
Describe
Configure
reference in responses. Learn more
Enter a URL
Prioritize the knowledge sources you added for agent knowledge-based queries. Learn more
Websites
https://www.microsoft.com/en-us/human-resources
Capabilities
Code interpreter
Image generator
Suggested prompts
Title
Message
Culture
What is it like to work at Microsof
Flexible Work
Does Microsoft offer flexible work
Career Development
What is Microsoft's approach to C
Add a suggested prompt
New chat
FAQ Helper
Helps answer common team questions by referencing onboarding FAQs and public policy pages, providing concise and clear responses.
Culture
What is it like to work at Microsoft?
Flexible Work
Does Microsoft offer flexible work?
Career Development
What is Microsoft's approach to Career Development?
Type your message


New chat
What is Microsoft's approach to Career Development?
FAQ Helper
AI-generated content may be incorrect
Microsoft's approach to career development focuses on empowering employees through learning, growth, and leadership. Their HR mission is to support people who empower others to achieve more. Key elements include:
Clear leadership principles: "Create clarity, generate energy, and deliver success"
Manager excellence: Managers are expected to empower and support employees through modeling, coaching, and caring
Talent development: Microsoft continuously evolves its recruitment and retention strategies to align with modern work practices
You can explore more here
I hope this was helpful to you.
3 references
1 https://www.microsoft.co...
2 Leaders & manager excell...
3 Talent acquisition & mana...


New chat
how do i apply for a job?
FAQ Helper
AI-generated content may be incorrect
To apply for a job at Microsoft, visit the Talent Acquisition & Management page. It outlines their inclusive hiring practices and provides resources for job seekers. You can explore open roles, learn about the recruitment process, and apply directly through their careers portal.
I hope this was helpful to you.
1 reference
1 https://www.microsoft.co...

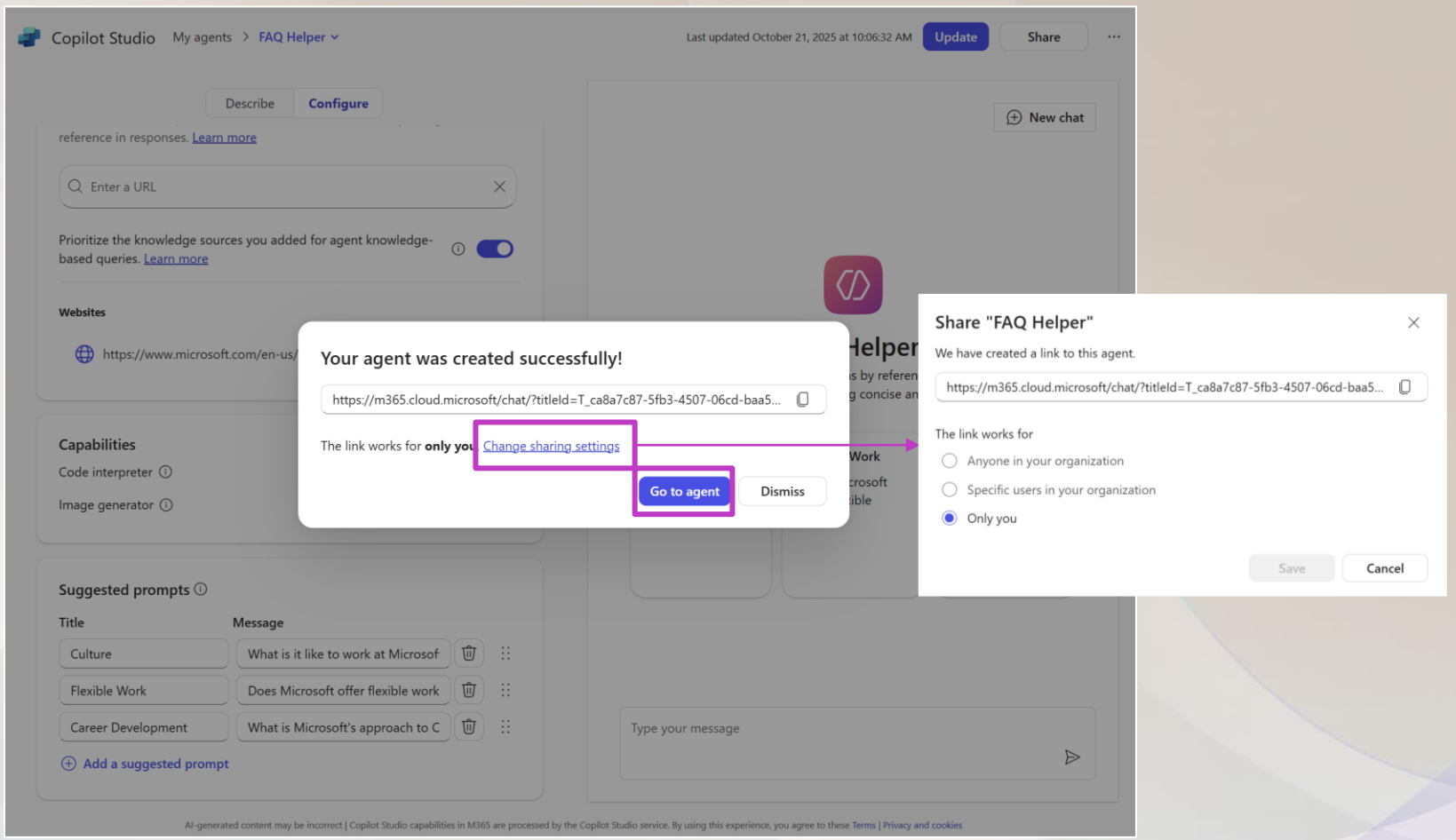
Step 10

- Click **Create**



Step 11

- Share with others by clicking **Change sharing settings**
- Or simply **Go to Agent**



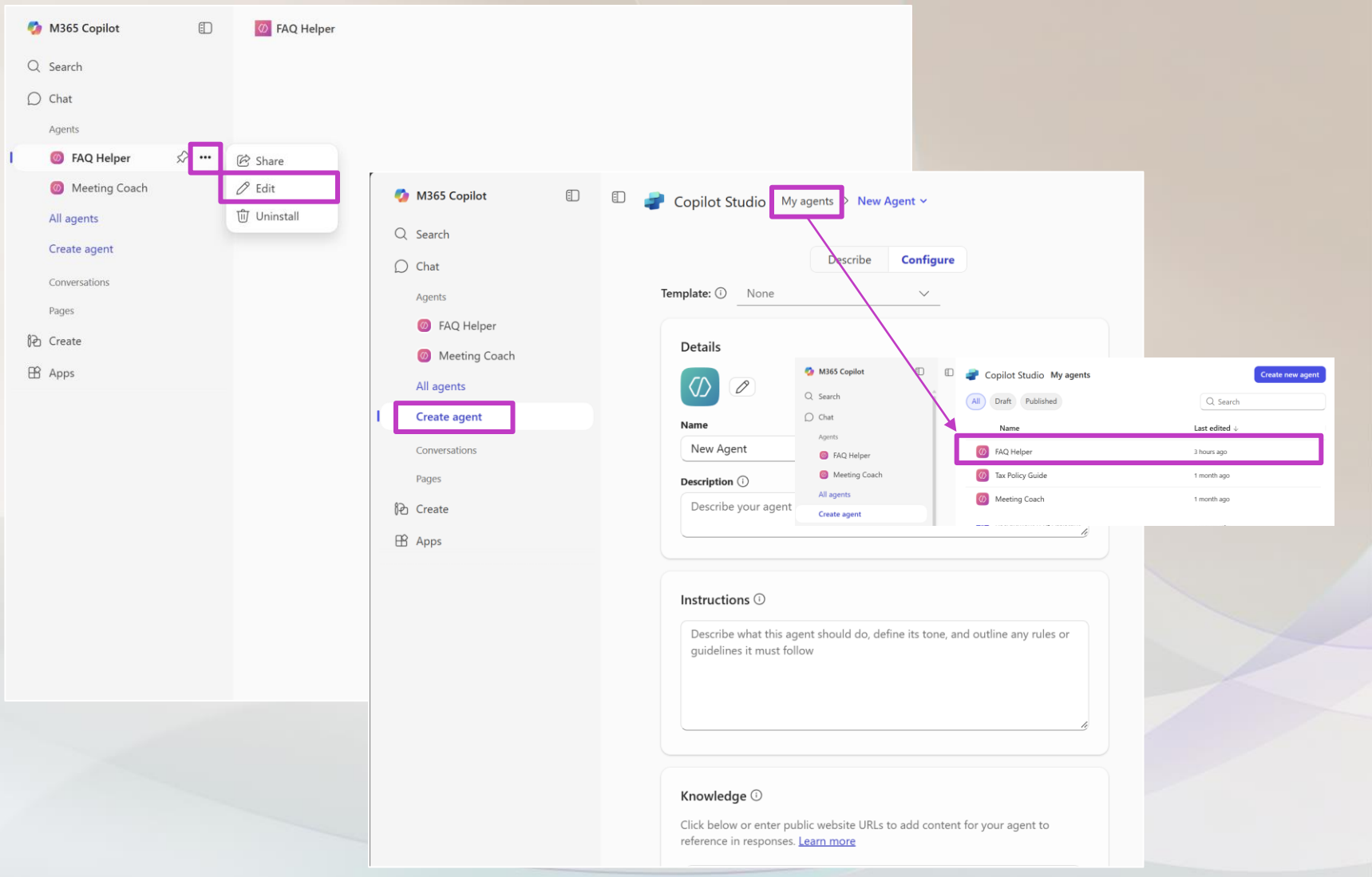
TIP: *It's a great idea to share with colleagues and ask them to test out your agent.*

Step 12

- To edit your agent, click the **three radio dots** and select **edit**

OR

- If you cannot see your agent, click **Create agent** select **My agents** and **click agent to edit**



You have now built your first AI Agent!

BUILD CHALLENGE TIPS

01

FOCUS

The Agent-a-thon is designed to make you rapidly prototype.

Leverage AI to help you build fast & finesse later.

02

LEARNING

Refer to your learning & notes on the Founderz Platform. Andrea has provided a breadth of detail to help you along.

Aka.ms/FounderzLearn

03

FELLOW

Work with your 'Fellow' to brainstorm ideas, overcome blockers, or have a friendly chat.

Aka.ms/FounderzFellow

04

Q&A

We have these slides and our Microsoft MVPs in the Teams Q&A section, ready to help you if you have questions.

Aka.ms/AgentBriefing

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Q&A in Teams

JUDGING CRITERIA

INNOVATION	USABILITY	IMPACT
How original is the AI Agent?	How usable is the AI agent?	What is the potential quantitative and qualitative impact of the AI Agent

Your time starts now!