Worksheet – Copilot Studio: Marketing FAQ Agent

# Objective:

This worksheet guides you through key steps in customizing and deploying a Copilot Agent tailored for marketing FAQs. Use it during the training session to document your work and reflect on key learnings.

## Section 1: Preparation

1. What is the role of this agent in your organization?

Write down your expected use case and target users:

1. What prerequisites must be in place before importing the agent?

[ ] Access to Microsoft Copilot Studio

[ ] Creator/Admin permissions

[ ] Completed JSON agent file

[ ] Internal resources linked (SharePoint/OneDrive)

## Section 2: Import and Customize

1. Import the agent using the provided JSON file.

Copilot Studio > Create > Import Agent

1. Customize your topics (edit one):

Topic Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Original Trigger Phrase: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

New Trigger Phrase (your own idea): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Updated Response:

## Section 3: Extend the Agent

1. Link your agent to internal documents:

Write the SharePoint or OneDrive links used in responses:

Topic: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_→ Link: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Topic: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_→ Link: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Define escalation options (optional):

**Example:** Forward to Marketing contact form / person

## Section 4: Test & Feedback

1. Test 3 questions and evaluate responses:

|  |  |  |
| --- | --- | --- |
| Question | Response Satisfactory? | Notes |
| 1. | Yes / No |  |
| 2. | Yes / No |  |
| 3. | Yes / No |  |

1. What would you improve in this agent?

## Section 5: Wrap-Up & Takeaways

1. Key learnings from this session:
2. Next steps for your team:

[ ] Share agent internally

[ ] Collect feedback from users

[ ] Plan expansion to new areas

[ ] Schedule agent updates and maintenance