

From curious to
confident,
in one page.



WHAT IS A COPILOT AGENT?

Think of Microsoft 365 Copilot as your all-rounder assistant.

Copilot Agents are specialists: trained on specific topics, tasks or processes.

They can answer questions, guide workflows, or run routine tasks.
You can build and customise them in Copilot Studio.
Find and launch them directly in Microsoft Teams.

WHY IT MATTERS

- ✓ Puts knowledge and processes at people's fingertips.
- ✓ Cuts repetitive admin.
- ✓ Creates consistency and confidence across teams.
- ✓ Scales value beyond "one-off" Copilot use.

KEY TERMS

MADE SIMPLE

Use case ✦ Real-life problem an agent solves.

Copilot Studio ✦ Where you build/manage agents.

Persona ✦ Who the agent is built to help.

Agent ↔ Agent ✦ Agents sharing info with each other.

Human ↔ Agent ✦ A person asking the agent for help.

Prompt shield ✦ Guardrails that keep responses safe and accurate.

Starter prompts ✦ Suggested first questions to guide users.

Triggers ✦ Words or actions that activate the agent.

Backlog ✦ List of future improvements or new ideas.



PRO TIPS:

Start small – pick one real problem, not ten.

Test early – get feedback from actual users.

Build safely – Prioritise in governance and guardrails.

Tell the story – share wins to build momentum.

DESIGN CHECKLIST



USER FOCUS
(Value)



Who is it for?
What's the mission?



NUDGES
(Starter prompts)



Add starter prompts to kick things off.



LIBRARY
(Knowledge)



Define the knowledge it needs.



ON SWITCH
(Triggers)



Set clear triggers so it knows when to help.



CHARACTER
(Prompt shield)



Build in tone, safety and guardrails.



KNOW-HOW
(Topics)



Outline topics and actions it can cover confidently.



THE INFORM TEAM