



Copilot Agent Briefing

Practical AI for public service teams

A 40-minute session on Microsoft 365 Copilot, agents, and getting started safely





What we'll cover today

1



The right mindset AI supports the work you love — it doesn't replace you.

2



Copilot & agents, simply What Microsoft 365 Copilot is, and how agents extend it.

3



Agents for Business A tour of agent types with application-ready examples.

4



Governance made clear Who should build what — and partnering with IT.

5



Your next step A simple, no-cost path to get started.





The Mindset

AI isn't here to do your job. It's here to help you do the parts you love.

That means less time gathering, formatting, and chasing information — and more time to do the work you are passionate about.



A supportive assistant A second set of eyes — never a replacement for your knowledge.



You stay in control You review, decide, and keep your professional judgment.



Built for real work Grounded in your documents and information.



THE BASELINE

Meet Microsoft 365 Copilot



Copilot is generative AI woven into the apps you already use. It reasons over your work content — securely, inside your tenant — to help you create, catch up, and get answers in seconds.



Ask Get grounded answers from your files, chats, and email.



Create Draft documents, emails, slides, and graphics fast.



Catch up Summarize long threads, documents, and meetings.



Act Extend Copilot with agents that perform real tasks.

Copilot lives where you work



Teams



Outlook



Word



PowerPoint



Excel



OneNote



SharePoint



Copilot Chat

One assistant, everywhere — no new app to learn.



MAKING IT MAKE SENSE

Three roles these tools provide



Copilot Notebooks

Your Digital Librarian

Gather your documents, standards, and past materials in one place. Ask, and it retrieves exactly what you need — instantly.

Standard user



Copilot Agents

Your Personal Assistant

A helpful assistant that supports what you already do — offering a second set of eyes, never taking over your work.

Standard user



Copilot Studio Agents

Your Specialized Contractor

When you need agents that actually perform tasks — this is where power users and IT build tailored, governed solutions.

Power user / IT



THE WORKSPACE

Copilot Notebooks keep everything for one topic in one place

A notebook is a focused workspace where you collect the files, links, and notes for one department or project — then ask Copilot questions grounded in only that set.



Gather your sources Pull documents, links, slides, and notes into one place.



Answers you can trust Copilot reasons over the notebook, not everything else.



Reusable all year Get summaries, study guides, FAQs, and audio overviews on demand.



A quick note before we demo

This is a demo environment

Everything you'll see today runs in a sandbox tenant set up for this session.

Your view may look a little different

Menus, features, and licensing can vary from what's enabled in your own environment.

If something's missing, ask your IT team

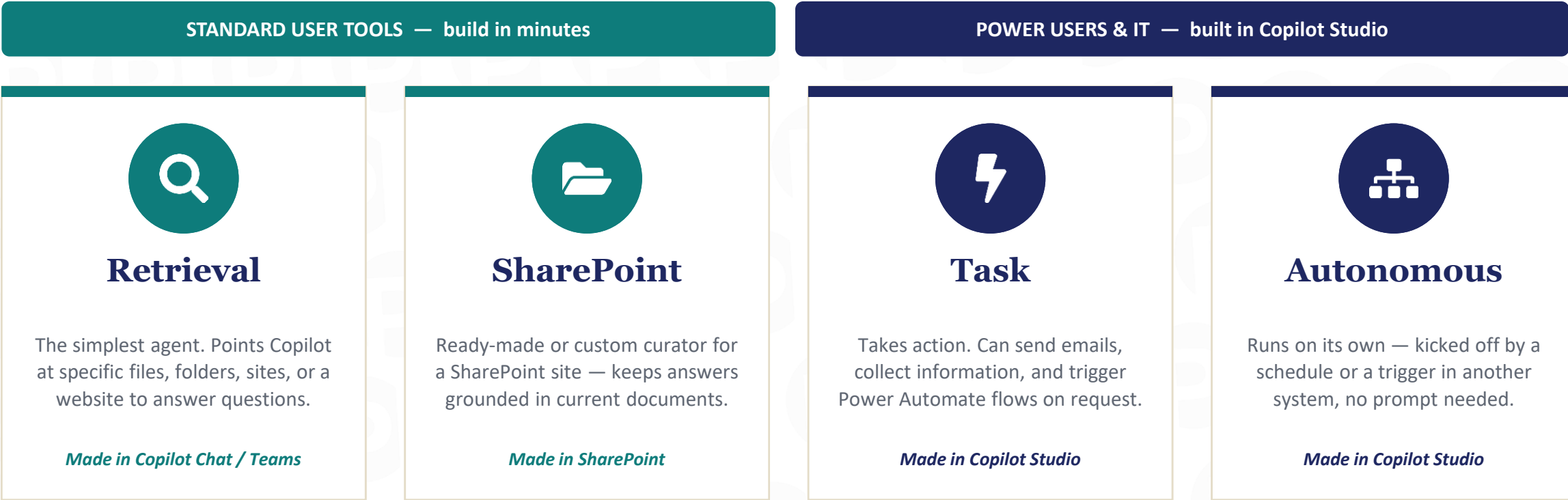
Your IT professionals can confirm what's turned on and help you get access.





The Copilot agent landscape

An agent focuses Copilot on specific knowledge and gives it defined actions. They range from simple, everyday tools to advanced solutions built by developers.



YOUR NEXT STEP

Getting started on your advanced Copilot Journey



Start where you are

1

You already own Copilot Chat and Notebooks. Pick one real, repetitive task and try it this week.



Build one small agent

2

Create a simple retrieval agent on materials you trust



Bring IT along

3

For anything that takes action, partner with IT early so it's secure, supported, and scalable.

How Planet can help

A free, no-pressure next step for your team:



Industry briefing

A tailored session on Copilot use cases for your type of work.



Technical deep-dive

Hands-on guidance for IT on building and governing agents.



Agent catalog

A growing library of pre-built agents by role and use case.

