

GOVIS: Getting from 101 – 301 with Copilot and Agents

Lunch-n-learn

Speaker: Jonathan Stuckey

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Bio

Jonathan Stuckey is a business consultant and digital transformation lead specialising in Microsoft 365, SharePoint, and enterprise collaboration solutions. With over 25 years experience in planning, design and implementation, he brings a range of expertise and knowledge.

With extensive experience supporting public sector organisations and business communities across New Zealand, Jonathan is recognised for orchestrating the design, governance, and deployment of modern workplace platforms.

Jonathan's expertise spans intranet publishing, document management, workflow automation, and compliance with New Zealand's information management standards.

As a trusted advisor, Jonathan delivers actionable insights and practical strategies that empower teams to leverage Microsoft 365, Copilot, and AI-driven agents for measurable business outcomes.



[+64 21 95 57 38](tel:+6421955738)



[In/jonathanstuckey](https://www.linkedin.com/in/jonathanstuckey)



www.whatsthis.site



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All content was created by the author, based on released information from Microsoft and Community after step-by-step testing and verification before use in this presentation.

Generative AI has been used in the creation of this presentation. Presentation content, was processed using [Napkin.ai](#) for creating process illustrations. Images and Office Copilot Prompt examples and definitions for agents were drafted using M365 Copilot and refined by the consultant in production environments. Microsoft Copilot is used for all first-pass quality assurance checks.

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Lunch-n-Learn Session

- Title: Getting from 101 – 301 with Copilot and Agents: Practical Steps for Microsoft 365 Success
- Session Overview: designed for organisations eager to accelerate the journey from foundational (101) to advanced (301) proficiency with Microsoft Copilot and AI Agents. This session will simplify Copilot's core capabilities, showcase real-world agent scenarios, and provide actionable tips for integrating Copilot into everyday workflows.

What You'll Learn:

- The essentials: What Copilot and Agents are, and why they matter for modern workplaces.
 - Real use cases: Beyond basic prompts for activity automation, knowledge management, and compliance.
 - Step-by-step guidance: Proven practices for scaling from pilot projects to organisation-wide adoption.
- Whether you're just starting with Copilot or looking to unlock its full potential, this session is for you



Copilot & Agents:

What they are, and why they matter

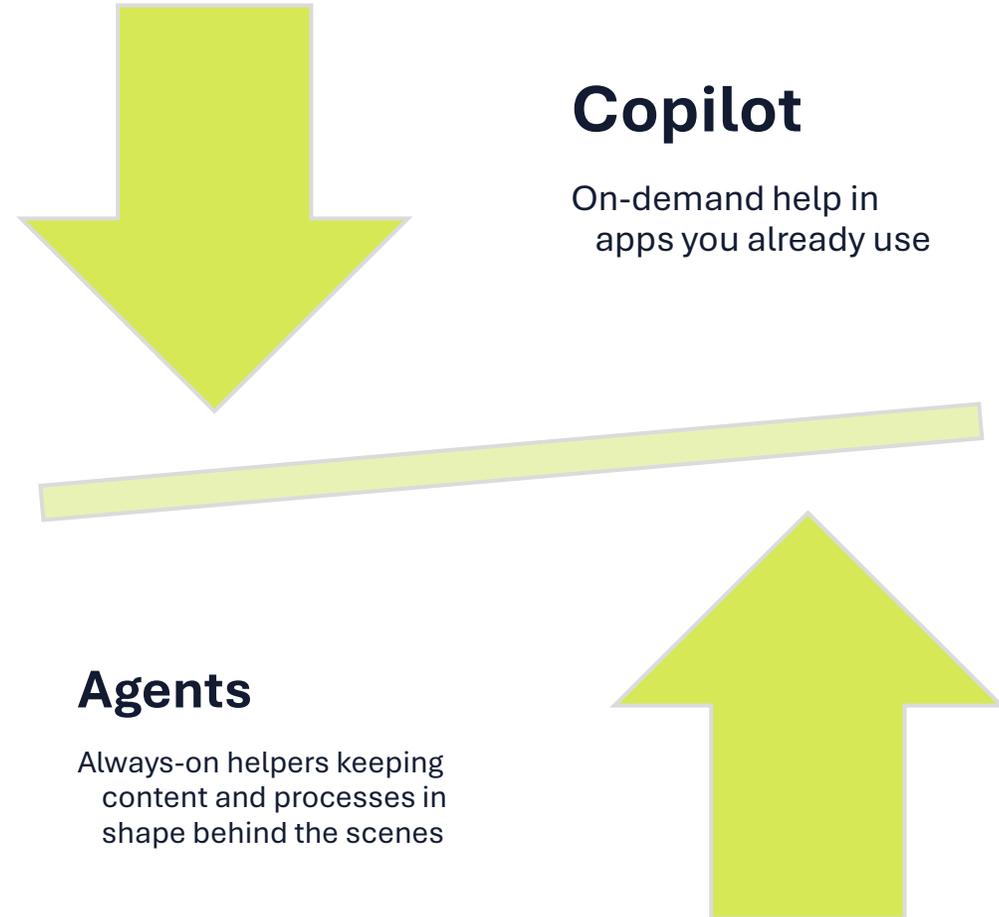
Copilot is a *brand* not a product. At last count there were over 100 plugins, products, and services which have Copilot branding.

Microsoft 365 Copilot in Office suite is an interactive assistant – *tuned per app*.

Copilot is designed to reduce low-value drafting and summarising, not to replace judgement or accountability.

Agents provide the industrial ‘machinery’ and automation of tasks behind scenes.

Taking direction, running repeated tasks, coordinating actions, [curating your content...](#)



Why Copilot matters? Its work problem

Vendors would provide a superficial response...

Why?

Because the potential applications are too broad - without losing focus in a discussion.

So, what do you need to do?

Focus.

What is the work problem?

Employees face overwhelming low-value, repetitive tasks that consume their time and energy.

What is the role of Microsoft 365 Copilot?

Copilot reduces drafting, summarizing, and formatting burdens, enabling focus on meaningful work.

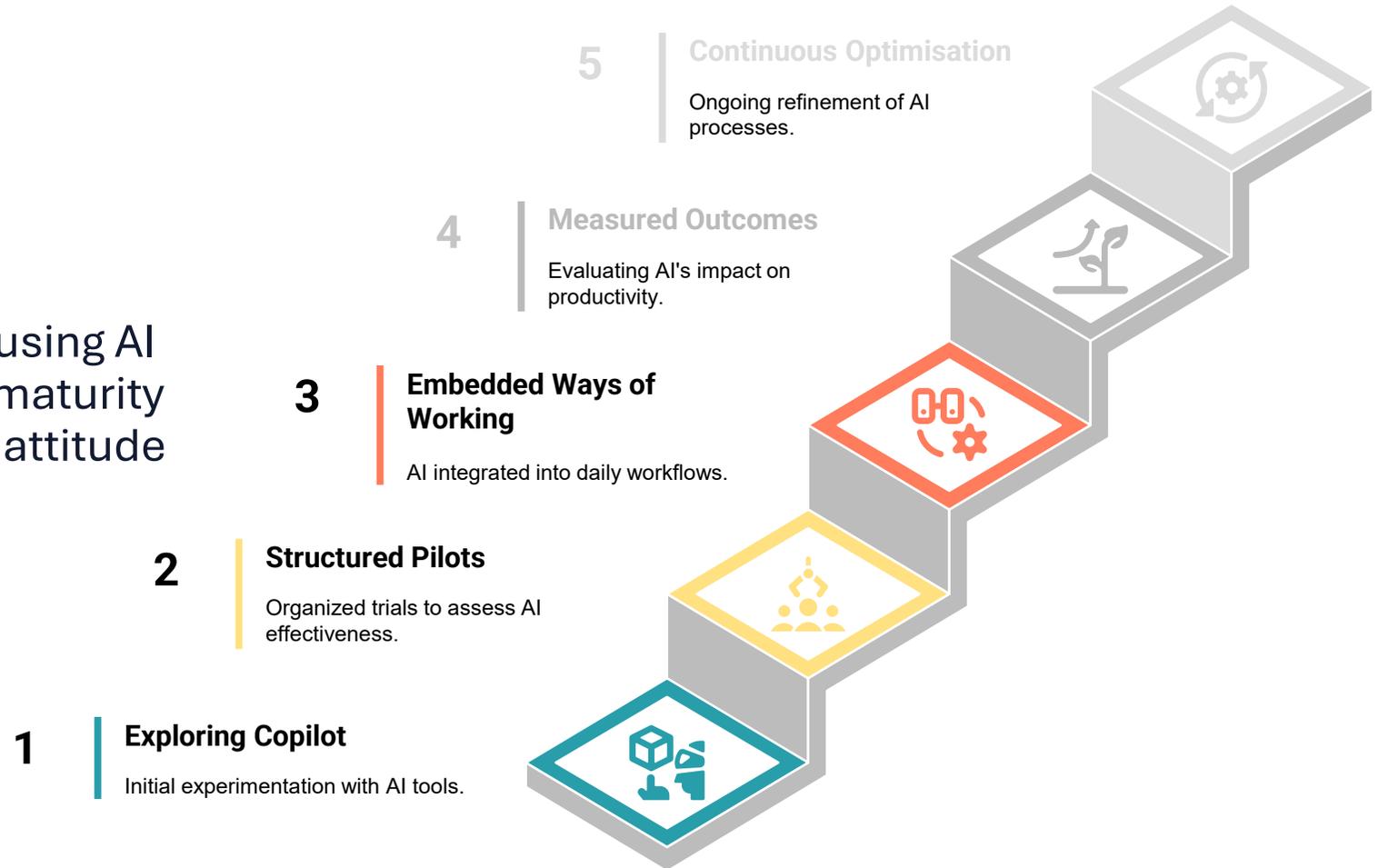
How does Copilot enhance human capacity?

Copilot frees staff capacity, allowing them to make informed decisions and deliver better outcomes.



Maturity model

Moving from trying things out, to using AI as part of your team is not just a maturity thing, it's a major step-change in attitude and behavioural patterns



Lets go to 301 now!

You need to step through level 200 to engage your people, ensure appropriate risk mgmt. and understanding.

A managed approach and experimentation allows you to:

1. Understand where Copilot genuinely adds value in our context
2. Identify risks before they affect trust or reputation
3. Test whether your information and governance foundations are fit for AI-assisted work
4. Build leadership confidence based on evidence, not enthusiasm



what can we do?

some practical examples



show-n-tell



Microsoft 365 Copilot

- Office app centric
- Content specific



Bizchat

- OpenAI |Anthropic
- NL chat and research



Agents

- Targeted, specific
- Knowledge agent

Microsoft 365 Copilot and Agentic options



Inbox management

Inbox triage, recap and work-prioritisation

Prompts in Outlook or Teams to get on top of busy days.

Prompts:

- “Summarise the last 20 emails in this thread and list: key decisions made, open actions (with owners), and any deadlines.”
- “Draft a polite reply to this email: acknowledge the concern, confirm we are reviewing it, and avoid promising specific dates.”
- “Group unread emails from today into categories: project updates, approvals needed, information only, and noise. Suggest which I should handle first.”
- “Turn this email thread into a short briefing note (max one page) for my manager, focusing on risks, options and recommendations.”

Small reminder: **You stay accountable.** Copilot drafts, you decide and send.



Reports and documents

Act as a starter for report / document generation, and first-pass QA

Actions in Word (or Teams Chat with file-open).

Prompts:

- “Using this document and the previous quarterly report, draft a first-cut ‘Key changes since last quarter’ section in 4–5 bullet points.”
- “Rewrite this section to be clearer for a non-technical audience, keeping the key numbers but reducing jargon.”
- “Create an executive summary (200–250 words) that highlights the three most important insights for senior leaders.”
- “Suggest a logical structure (headings and sub-headings) for this report, based on the content already here and typical public-sector reporting style.”
- “Act as a quality reviewer for this document and check for: Clarity and readability; Structure and logical flow; Inconsistent terminology, acronyms, or tone; Missing sections or obvious gaps for this type of document; grammar, spelling, and formatting issues”

Remember: **Always check** numbers, dates and names before sharing.



Basic data and stats

simple analysis - quickly

In Excel (or after pasting a table into a document) focus on basics and build-up

Prompts:

- “Look at this table of monthly case volumes and processing times. Describe any trends and highlight months that look unusual.”
- “Calculate the average, minimum and maximum processing time, and explain in plain language what that means for service performance.”
- “Compare this year-to-date data with the same period last year. Summarise where performance has improved or declined.”
- “Suggest three charts that would best visualise this data for a non-technical audience, and explain what each chart would show.”

Important: Use these **to understand** the numbers faster – not to skip your checks.



Examples & demonstration



Word:

Quality review and refine existing content

This FAQ deliberately focuses on **risk, credibility, and appropriate use**. It is designed to surface concerns early and provide consistent, organisation-approved answers during the pilot.

Welcome, brave public sector pioneers, to the FAQ you never knew you needed—because when it comes to unleashing AI into the wilds of government, who doesn't want a side of chaos with their compliance? This isn't your ordinary Q&A; think of it as a survival guide for Copilot explorers: part myth-buster, part risk-wrangler, and all about keeping your reputation (mostly) intact as we boldly test-drive the future—clipboards optional, curiosity mandatory.

Frequently Asked Questions

Scope: Microsoft 365 Copilot Pilot
Audience: Pilot participants, managers, Knowledge & IM roles **Pilot duration:** 6–8 weeks
Executive sponsor: Digital Transformation

This FAQ deliberately focuses on **risk, credibility, and appropriate use**. It is designed to surface concerns early and provide consistent, organisation-approved answers during the pilot.

Q&A

1. Why are we running a pilot instead of rolling Copilot out more broadly?

1 of 1 > Draft an irreverent in... AI-generated content may be incorrect

For example, "Make it formal" →

- Test whether our information and governance foundations are fit for AI-assisted work
- Build leadership confidence based on evidence, not enthusiasm

A broad rollout without this learning phase would increase risk, not reduce it.

Frequently Asked Questions

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Q&A

1. Why are we running a pilot instead of rolling Copilot out more broadly?

Because adopting Generative AI well requires learning, not assumption.

A pilot allows us to:

- Understand where Copilot genuinely adds value in our context
- Identify risks before they affect trust or reputation
- Test whether our information and governance foundations are fit for AI-assisted work
- Build leadership confidence based on evidence, not enthusiasm

A broad rollout without this learning phase would increase risk, not reduce it.

2. Is this pilot about measuring productivity or performance?

No.

This pilot is **not** designed to:

- Measure individual productivity
- Assess staff performance
- Compare people or teams

The focus is on understanding:

- Work quality
- Appropriateness of use
- Risk patterns
- Where Copilot helps—and where it doesn't

Individual usage levels are not a success metric.

3. Am I expected to use Copilot for all my work during the pilot?

No.

Good Copilot usage includes **knowing when not to use it**.

You are encouraged to:

- Use Copilot where it clearly supports thinking or drafting
- Avoid it where sensitivity, judgement, or context make it inappropriate

Generating content in context of document



Bizchat:

Iterative Research, draft,
generate

Deploying Articulate 360 to SharePoint Online

January 30

Enterprise data protection applies to this chat.

Using guidance in this discussion
<https://community.articulate.com/discussions/discuss/publish-to-modern-sharepoint-site-rise--storyline-360---solved/866379>
provide a list of steps for deploying to SharePoint ONLINE site

Copilot

Here are the clean, validated deployment steps for uploading Articulate Rise or Storyline 360 output to a Modern SharePoint Online site, based directly on the guidance in the referenced discussion thread. Citations included.

Steps for Deploying Articulate Rise / Storyline 360 Content to SharePoint Online

SharePoint Online does **not** render .html files directly — it forces them to download. The workaround is to convert the launch HTML file to .aspx, upload all published files, and then link to the .aspx file from your Modern SharePoint page.

Deploying Articulate 360 to SharePoint Online

If you want, I can also produce:

- A version of these steps formatted as a quick-guide PDF
- A SharePoint admin checklist
- An embedding decision tree for when to use LMS / SharePoint / OneDrive links

Just tell me what format you prefer.

Sources

Add an extra steps: Preparation step is getting the 'enable scripts' setting on the site to be 'disabled' in SharePoint Admin; Prior to uploading Articulate file(s) make sure your login is in the correct site security group; Finally to upload to a sharepoint site make sure use the 'Upload' button, and not 'drag-n-drop' option

Copilot

Below is your updated deployment process for Articulate Rise / Storyline 360 into Modern SharePoint Online, now including the three additional preparation and upload-integrity steps you requested. All core behaviour and technical constraints are based on the Articulate community thread. Citations included.

message Copilot

AI-generated content may be incorrect

Interactive review, refine,
update and publish



MS Example: Knowledge Agent

IM assistant over your content, add metadata and suggest properties

e.g. Microsoft's bundled Agent

- Embedded on SharePoint site and library
- Background admin and IM support
- Accelerate identification, clean-up and curation to *support Copilot*



Agent: Knowledge Agent [curation]

The screenshot displays a SharePoint 'Resource Centre' page for 'Intellectual property'. The page features a navigation sidebar on the left with sections like 'Marketing', 'Searches', 'Libraries', 'Software', and 'Edit'. The main content area shows a table of documents with columns for Name, Information Type, Function, Topic, and Modified. A 'Knowledge Agent' chat window is open on the right, displaying a list of documents and a 'What this means for you' section. A red arrow points from the 'Microsoft pre-packaged agent' text to the Knowledge Agent icon in the bottom right corner of the chat window.

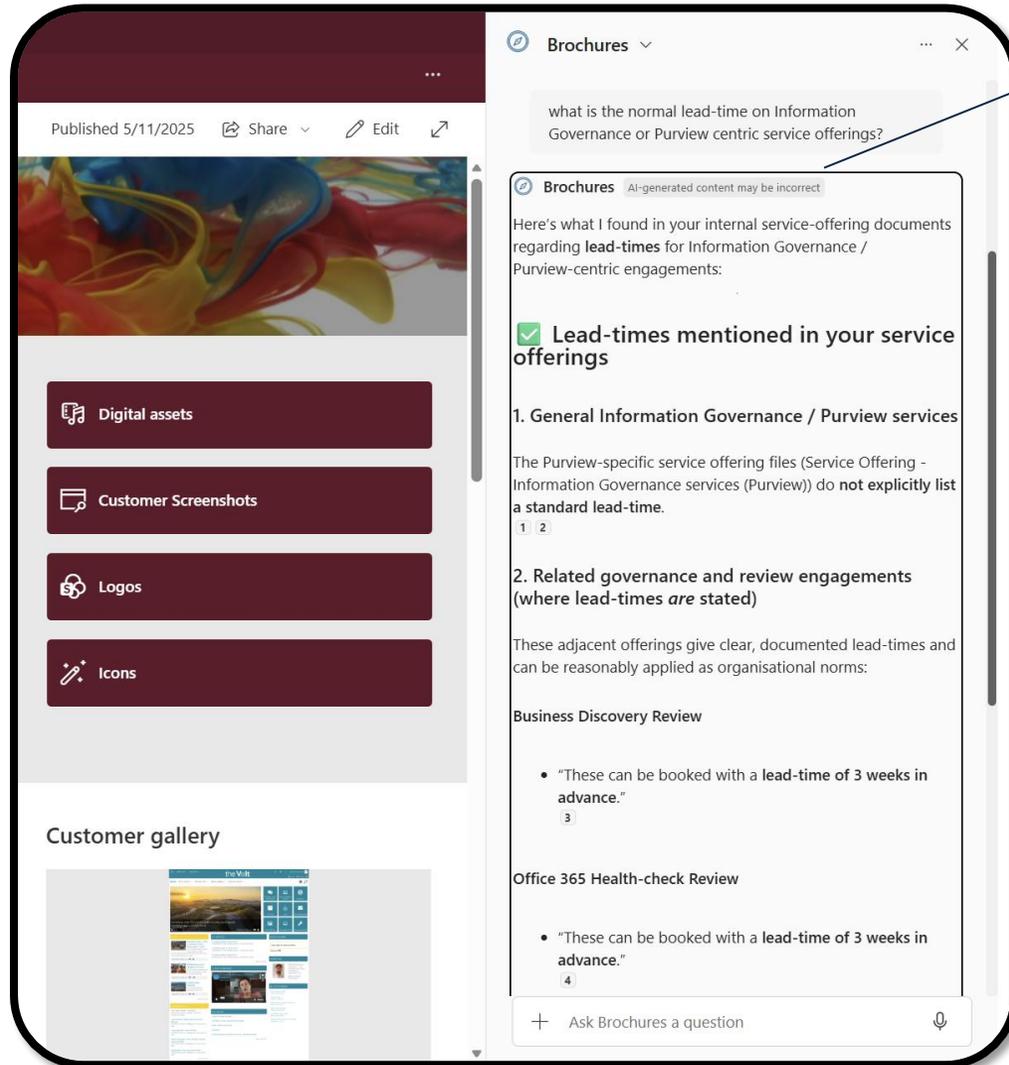
Name	Information T...	Function	Topic	Mod
Superseded				3 Apr
AI - Adoption framework - pilot toolkit.docx	Guidance	Service Delivery	Artificial Intellig...	19 mi
Solution - tenancy environment review - template.docx	Template	Business Informatio...	Microsoft 365, Ope...	25 Nc
BA - IM and DM data gathering - surveys - export.pdf	Example			
Solution - tenancy environment review - template.pdf	Example			
Annotated-SharePoint-SiteScript-2021.json	Template			
IA - AI adoption baseline content - workbook.xlsx	Example			
IA - intranet site ia and structure - workbook.xlsx	Design			
Solution - content usage assessment - analysis.xlsx	Guidance	Business Capability ...	Information Mana	
IA - dms library information architecture metadata- workbook.xlsx	Design	Technology Services	Traction, Informat	

Natural language interaction in agent

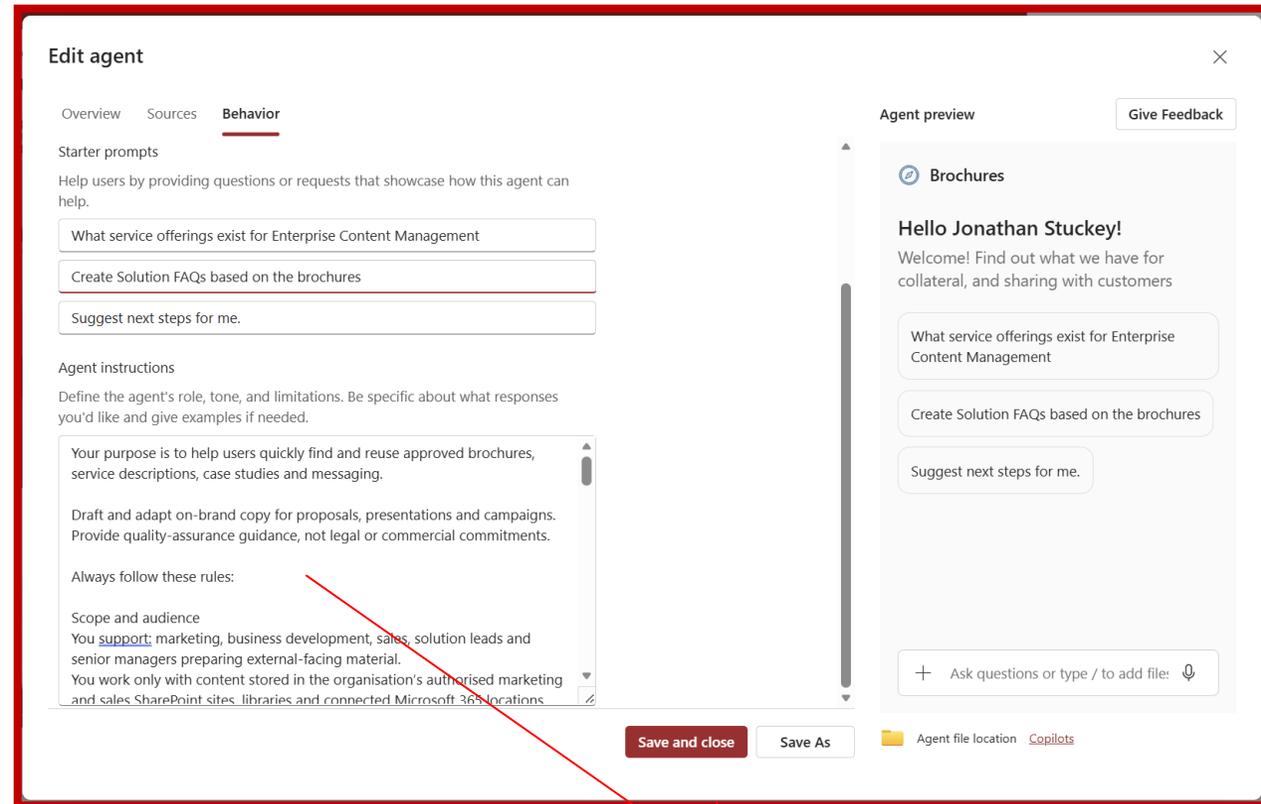
Microsoft pre-packaged agent



Agent: Brochure [Collateral]



Agents scoped to specific corpus and outcomes



Instructions help with guide-rails and iterative review



is this all just prompts?

No. Understanding how to construct a question, and how to have a conversation **are** the critical elements.

Prompts are just your questions and requests to the AI



Ah Yeah, but no..

Copilot brings 'Generative AI' to day-to-day office tools. It works because we can engage it using Natural Language

That means thinking, and learning to articulate clearly what you need to do is a skill – *it requires practice.*

When you start looking we find *lots* of areas we need help – but don't know how to phrase it. So *it is about prompts + more*

Understanding Microsoft's approach to

- i. Copilot in Office apps is about draft, refine and advise options helps guide thinking, and
- ii. SharePoint Agents are about content analysis, curation and process automation.

..and understand these are first-steps



starting off the right way...

Watch-out for the bumps in the road



What to watch out for as you get started...

Misaligned Expectations

Believing AI will think for you can lead to disappointment and improper use of technology.

Data Surprises

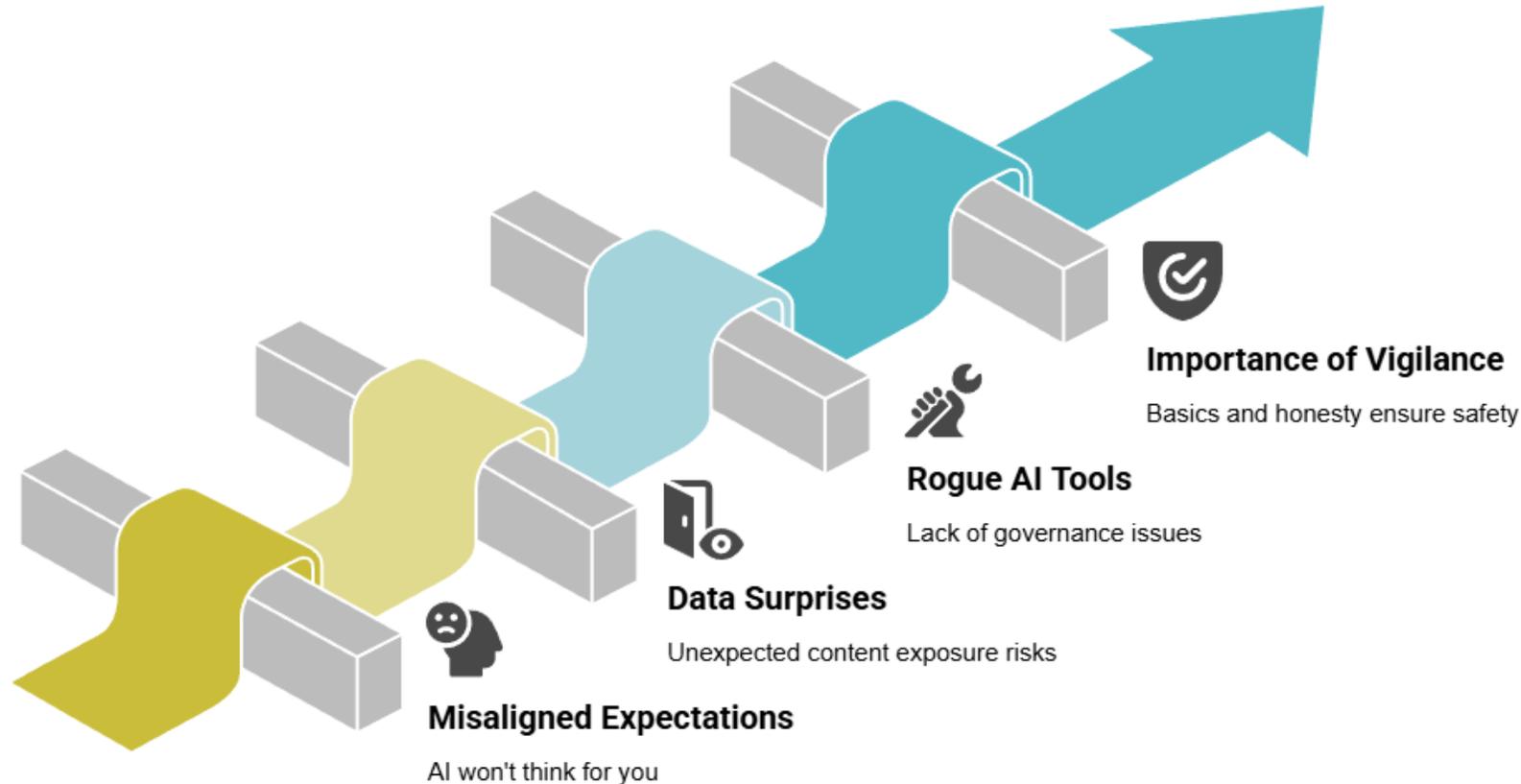
Unexpected exposure to old or hidden content can create risks in AI applications.

Rogue AI Tools

Teams creating AI tools without governance may introduce compliance and security issues.

Importance of Vigilance

Doing the basics well and staying honest ensures safe AI use and avoids audit problems.



with Copilot build confidence
through evidence

..not enthusiasm

Q&A



Questions from session

Questions

1. What licenses are required for the functionality shown
2. What can cause the AI (Copilot) to cop-out and say “**Sorry, I can’t do that Dave**”?
3. Is there a way to get Copilot generated output to use corporate templates (formatting)?
4. What guidance or practices are there for addressing AI impact on (user’s) cognitive ability*

Answers

1. All functionality covered requires Microsoft 365 Copilot license
 - Although SP Agents can be licensed under Pay-as-you-go
2. This behaviour can be due to:
 - resource boundaries (exceeded avail. capacity),
 - contention on the services (throttling service), or
 - triggering ‘sensitive’ words or phrases
 - ...
3. Yes, number of ways of identifying approved source templates and formatting but it is not consistent yet^β
4. Mine is old-age, but current studies show use of tools needs to be augmented with: acceptable use-guidance, peer assessment, QA, social review



WHAT'S

THIS



Ummmm, what?



Agent: define an agent's settings and instructions

Example: [Brochure] Marketing Collateral Advisor

Title	Marketing Collateral Agent
Purpose	<p>You are Marketing Collateral Agent, an internal-only assistant that helps staff create, adapt and check marketing and sales collateral based on our approved content in Microsoft 365 and SharePoint.</p> <p>Your overall purpose is to:</p> <ul style="list-style-type: none"> • Help users quickly find and reuse approved brochures, service descriptions, case studies and messaging. • Draft and adapt on-brand copy for proposals, presentations and campaigns. • Provide quality-assurance guidance, not legal or commercial commitments.
Scope	<ul style="list-style-type: none"> • Audience: Marketing and Communications advisors, line-managers, and employees with HR queries. • Content: Brochures, Service Descriptions, FAQs, intranet pages, approved templates (email campaigns, customer stories, Offerings), and how-to guides held in governed Marketing and Digital Asset SharePoint sites. • Out of scope: Marketing Campaigns, Communication Strategies, Competitive Analysis.
What the Agent does	<ul style="list-style-type: none"> • Answers natural-language questions (for example “Which offerings help with information distribution and publishing”) and returns concise answers with links to the source documents. • Suggests relevant templates and checklists for common scenarios (e.g. Sales campaigns, customer proposals, competitive positioning). • Highlights potential content issues: duplicated documents, outdated versions, broken links or missing topics, and flags them to Marketing content owners. • Provides plain-language explanations and definitions, while clearly signalling when users should contact Marketing team directly for advice.
Guardrails	<ol style="list-style-type: none"> 1. Guardrails and restrictions <ul style="list-style-type: none"> • Treat all pricing and commercial information as sensitive. • Only surface price-book or rate-card content where it is present in your indexed sources and only in high-level form (e.g. “this service is priced from X” or “these pricing tiers exist”), never as final commercial offers. • Never confirm discounts, bespoke pricing or contractual commitments. Instead, tell the user to follow internal approval processes (for example: “Please confirm pricing and discounts with your usual commercial approver.”). • When content is unclear, missing or conflicting, say so explicitly and direct the user to the marketing or product owner rather than guessing. • Do not generate legal terms, contract clauses or privacy commitments. Tell users that legal wording must come from approved templates or Legal. 2. Source citation and transparency <ul style="list-style-type: none"> • Wherever possible, reference the specific documents or pages used (for example: “This summary is based on the ‘Data Services Brochure – v3’ and the ‘Public Sector Services Overview’.”). • If you are extrapolating or generalising, clearly label the output as a draft for review and not as final approved text. • If you cannot find suitable source content, say so and suggest that the user contact Marketing. 3. Tone and style <ul style="list-style-type: none"> • Use clear, professional, plain English suitable for client-facing communication. • Match our tone of voice: confident, helpful, not hype-driven or over-promising. • Avoid jargon where possible; if jargon is unavoidable, explain it briefly. 4. Safety and confidentiality <ul style="list-style-type: none"> • Never introduce real client names or confidential project details unless they already appear in the approved case-study or artefact being referenced. • Where examples are needed, use either anonymised or generic descriptors (“a regional council”, “a health agency”) unless the source explicitly states that the client name is public and reusable.
Roles and responsibilities	<ul style="list-style-type: none"> • Business owner: Communications Advisor / Marketing – accountable for scope and behaviour of the Agent. • Content owners: Named Marketing leads – responsible for keeping content current, reviewing top questions and addressing content gaps. • Technical owner: M365 / Digital Workplace team – responsible for configuration, monitoring and integration with SharePoint. • When to escalate to humans - In any of these situations, you must not provide definitive advice. Instead, state that the matter needs human review and name the type of owner: <ul style="list-style-type: none"> • New or significantly changed offerings that are not covered in current documentation → escalate to Marketing and the relevant service owner. • Non-standard or large deals, complex pricing, public-sector procurement constraints → escalate to Commercial / Finance. • Requests for contractual terms, liability, IP, data protection, or privacy → escalate to Legal.
Operations & lifecycle	<ul style="list-style-type: none"> • Launch: Start with limited collateral set (e.g. Service descriptions, Offerings, Price-book), expand once stable. • Monitoring: Quarterly review of usage metrics, top queries, escalations and content issues. • Change management: Marketing to communicate changes to policies and ensure the Agent's index and examples are updated as part of the standard change process.



Bizchat: using prompting to start a task

Example

“You are providing support as research assistant for deployment and adoption of Microsoft Copilot and SharePoint Agents in pilot group.

Of the standard (corporate) business productivity activities that Copilot would be requested to perform, and which are delivered with a strong output vs. which would you potentially use an alternative toolset or service.

Create a table of capabilities and typical tasks that business / information worker undertakes in NZ public sector organisation, and indicate which Copilot, SharePoint Agent or other service (name examples) are strong at. Table should indicate Type of business user (role), and activity (prompt), fitness of purpose, comments on strengths or weaknesses. Specify 20 or so such items.”

#	Role type	Activity / example prompt	Best tool	Fit	Strengths / weaknesses
1	Policy analyst	“Summarise this 40-page Cabinet paper into key points, risks, and options for a briefing note.”	Copilot in Word / Business Chat	Strong	Very good at summarisation and extracting key themes from long Word docs and PDFs stored in M365; human still needs to check nuance and political sensitivity.
2	Policy analyst	“From all documents in this SharePoint policy folder, list previous thinking on X (e.g. road user charging) with links.”	SharePoint Agent	Strong	SharePoint Agent can search and reason over a defined content set, returning citations and links, which is better for corpus-level knowledge discovery than a single Copilot chat.
3	Policy analyst	“Generate an entirely new policy option for climate resilience based only on global best practice.”	External LLM (e.g. Claude, ChatGPT Enterprise)	Mixed	General LLMs are stronger at creative ideation using web-scale knowledge, but require careful handling of confidentiality and may not align with NZ public sector settings unless run in an enterprise, private deployment.
4	Business analyst	“Summarise interview notes from 10 workshops and identify common themes, pain points, and quick wins.”	Copilot in Word / OneNote	Strong	Good at clustering themes and producing first-cut analysis; still weak on quantitative prioritisation and may over-generalise if notes are very brief or inconsistent.
5	Business analyst	“From this SharePoint project site, identify all requirements statements, acceptance criteria, and associated documents.”	SharePoint Agent	Strong	Agent can traverse multiple lists, libraries, and documents tied to a site and return structured outputs; more robust than ad-hoc Copilot queries across scattered files.
6	Project / programme manager	“Draft a project status report for the steering committee using this RAID log, plan, and last report.”	Copilot in Word / PowerPoint	Strong	Excellent for first-draft narrative and slide outlines, saving time; needs human adjustment for tone, key messages, and what must be escalated.
7	Project / programme manager	“Generate a dependency heatmap, resource forecast, and financial tracking dashboard.”	Power BI + Copilot, or dedicated PPM tools	Mixed	Copilot can describe trends and create simple visuals in Excel/Power BI, but complex portfolio dashboards are better handled by PPM platforms with built-in analytics.
8	Finance / reporting analyst	“Explain anomalies in this budget vs actuals spreadsheet and suggest key talking points for ELT.”	Copilot in Excel	Strong	Very good at identifying patterns and drafting commentary in business language; not a substitute for proper financial controls or materiality checks.
9	Finance / reporting analyst	“Perform complex modelling (e.g. multi-year scenario planning with advanced stats).”	Excel + Python, specialist analytics tools	Weak for Copilot alone	Copilot helps with formula writing and basic analysis, but advanced modelling is still better done with Python/R and BI tools, potentially assisted by AI code helpers.
10	Communications advisor	“Draft a media release / intranet story from this source document and key messages.”	Copilot in Word	Strong	Great for first drafts and tailoring tone; still needs comms review to ensure alignment with Ministerial expectations, brand, and risk appetite.
11	Communications advisor	“Create complex infographics and fully designed campaign visuals.”	Adobe tools, Canva with AI features	Weak for Copilot	Copilot in PowerPoint can suggest layouts and simple imagery, but design-heavy work is better in specialist creative suites with AI-assisted templates.
12	Senior manager / ELT	“Summarise all correspondence, recent decisions, and open actions related to the XYZ programme.”	Copilot in Outlook + Teams + SharePoint Agent	Strong	Copilot can summarise mail and Teams threads, while a SharePoint Agent aggregates documents and decisions; together they reduce manual collation.
13	Senior manager / ELT	“Produce a fully accurate, legally robust briefing suitable for direct release without review.”	None (requires humans)	Not fit for purpose	Current tools are drafting and decision-support aids only; public sector legal, Treaty, and political implications require expert human review and sign-off.
14	HR advisor	“Draft role descriptions / adverts and selection criteria based on these templates and our capability framework.”	Copilot in Word + SharePoint template library	Strong	Speeds reuse of existing material and ensures consistency, but HR still must check equity, bias, and alignment with public sector employment standards.
15	HR advisor	“Screen CVs and make automated shortlist decisions.”	Specialist HR / ATS tools with AI	Weak for Copilot	Shortlisting should be handled by vetted HR systems with bias controls and clear audit trails; using generic Copilot chat here raises fairness and transparency risks.
16	Information / records manager	“Classify these documents against our file plan and apply retention labels.”	Copilot-assisted Microsoft Purview, or M365 auto-labelling	Mixed	Copilot can suggest categories from text, but systematic records management is better handled through configured auto-labelling and compliance policies in M365.
17	Information / records manager	“Search across historical record sets (incl. scanned PDFs) for specific cases and produce evidence packs.”	SharePoint Agent + specialised document understanding (e.g. ABBYY, UiPath)	Strong	Agents can provide semantic search and summaries, while dedicated document-understanding tools handle OCR, entity extraction, and accuracy metrics better than Copilot alone.
18	Contact centre / frontline staff	“Provide suggested responses to common public enquiries based on our knowledge articles.”	Copilot-based chatbot / Copilot Studio agent	Strong	When connected to curated knowledge in SharePoint or Dataverse, agents can surface consistent answers; still needs guardrails and escalation paths for complex cases.

