



From Copilot Chat to Custom Agents

Building AI Tools That Work for Your Nonprofit

From everyday prompting to a focused, governed tool your team can reuse.

Mat St. Cyr | Tech Impact



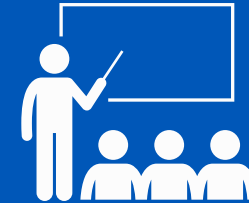
OUR MISSION IS TO LEVERAGE TECHNOLOGY TO ADVANCE SOCIAL IMPACT



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Mat St. Cyr

Manager, Application Development

I am an Applications Development Manager at Tech Impact with more than 20 years of experience helping nonprofits and mission-driven organizations use technology to improve efficiency, strengthen governance, and expand impact. My work focuses on Microsoft AI, Power Platform, Dynamics 365, automation, and digital transformation initiatives that help organizations get more value from the tools they already own.



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You are already closer than you think

The same skills staff use to ask better questions in Copilot Chat can become the foundation for a simple, reusable agent.

Understand

What agents are and where they fit

Identify

Good nonprofit use cases

Build

A policy-grounded Teams agent

Govern

Data, permissions, and responsible use

The policy assistant is the live example, not the limit of what agents can support.

A chat solves now. An agent makes the solution reusable.

Copilot Chat

A person brings the prompt, context, and judgment each time.

Best for flexible, immediate work.

The quality of the result depends on the individual interaction.

Focused agent

The organization packages audience, knowledge, instructions, and guardrails.

Best for repeated questions or recurring support.

The experience becomes easier to share and maintain.

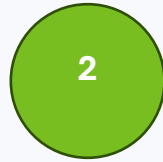
An agent is reusable context and behavior around a focused job.

From better prompts to better agent design



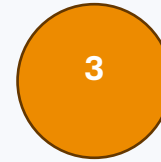
Audience

Who needs help?



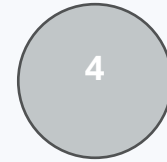
Knowledge

What approved sources should it use?



Instructions

How should it respond?



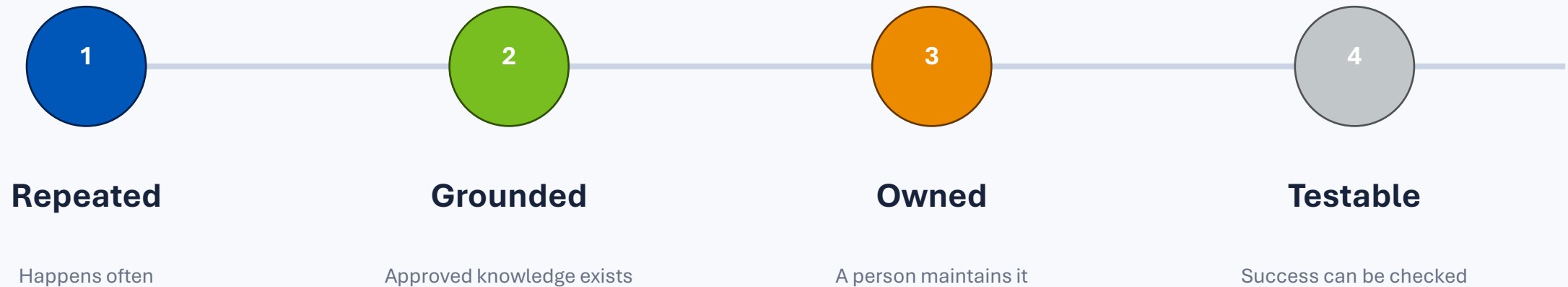
Guardrails

What must it not invent or decide?

The move from chat to agent design is mostly the move from personal context to intentional shared context.

Repeated, grounded, owned, and testable

A strong first agent has a narrow job, trustworthy content, a clear owner, and questions you can test.



Avoid starting with high-risk judgment, unclear ownership, or knowledge nobody maintains.

One technology pattern, several mission-supporting uses



Staff policy guide

HR, finance, security, and responsible-AI questions

Program resource finder

Eligibility, services, referral options, and staff resources

Volunteer onboarding

Training, procedures, schedules, and role guidance

Grant reporting guide

Approved requirements, deadlines, templates, and supporting resources

The strongest first agents make approved knowledge easier to find and use.

Knowledge first, then task support, then actions



Do not add actions just to make the agent feel more advanced. Add them when the outcome requires them.

Agent Builder and Copilot Studio serve different levels of need

Agent Builder

Focused conversational agents

Dedicated knowledge
Natural-language instructions
Create, test, and share in Microsoft 365

Copilot Studio

Advanced capabilities and orchestration

Actions and workflows
External-service integration
Specialized channels and complex requirements

Let the use case, risk, and required capability choose the tool.

A useful agent also needs boundaries and ownership



Approved sources

Ground answers in maintained content.

Permissions

Respect the access model of the source.

Human oversight

Keep important decisions with people.

Out-of-scope behavior

Say when the knowledge does not answer the question.

Governance starts before publishing, with the source, owner, audience, permissions, and boundaries.

Why an AI policy is a strong knowledge agent

Policies contain broad, nuanced guidance that staff often struggle to search manually.

Tools

Approved and prohibited use

Data

Confidential, donor, and personal information

Disclosure

Verification and transparency

Incidents

What to do when something goes wrong

Oversight

Human accountability and mission alignment

The agent should explain the approved policy, not create new policy.

The simple architecture



Start with the included, low-complexity path before adding actions, connectors, or autonomous processing.

Design the agent before you create it

 **Audience** Staff who need policy guidance

 **Scope** Approved AI-use topics

 **Guardrails** No invented rules or exceptions

 **Style** Clear answers with citations

Creation prompt

Create an internal AI Policy Assistant for staff in Teams. Use the approved policy as the authoritative source. Explain the policy clearly, cite relevant sections, never invent rules or exceptions, and say when the policy does not address a situation.

Keep the first prompt focused. Refine after testing.

Build the agent from the policy document

1

Store the approved policy in SharePoint

2

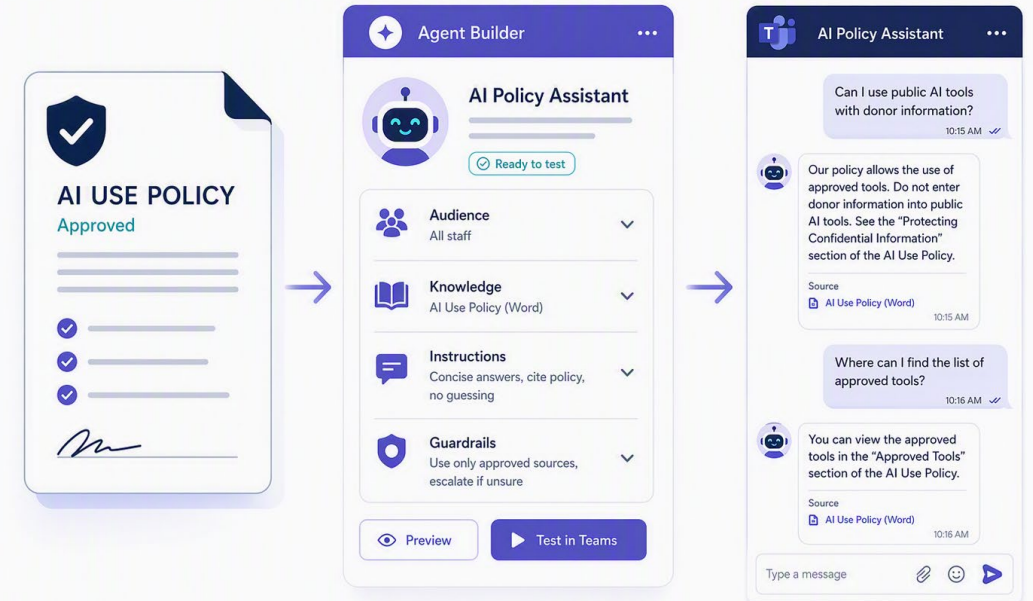
Create the agent and paste the creation prompt

3

Review knowledge, name, description, and instructions

4

Test a direct answer and an out-of-scope question



Demo fallback: keep a completed agent ready so the learning does not depend on provisioning speed.

Customize for adoption, not decoration

Name + icon

Make the job recognizable.

Description

Explain what staff can ask and where answers come from.

Suggested prompts

Seed realistic questions.

Fallback behavior

State when the source is silent and route to the owner.

Customization should reduce user hesitation and agent overreach.

Put the agent where staff work

1

Share into a supported Teams conversation or standard channel

2

Add the agent to the conversation

3

Ask a policy question in context

4

Verify the user can access the source content

Sharing the agent does not replace the permissions protecting the source content.

Demo with escalating questions

01 **Direct lookup** Which AI tools are approved or prohibited?

02 **Apply the policy** Can staff upload donor information to an AI tool?

03 **Process guidance** What should staff do after entering confidential information?

04 **Responsible uncertainty** Can an AI-generated voice be used to call donors?

The best answer may be: “The approved policy does not specifically address this situation.”

Treat the agent as an organizational asset



Define

Job, audience, owner, and success



Ground

Approved knowledge and permissions



Guide

Instructions, boundaries, and escalation



Test

Accuracy, citations, access, and uncertainty



Maintain

Content review, ownership, and lifecycle

Publishing is the beginning of the agent lifecycle, not the end.

Start with knowledge. Add complexity only when the value demands it.

Move from asking Copilot to designing a focused agent that helps the team work smarter.

FOCUSED • GROUNDED • GOVERNED



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Please take our post-session survey to help us
improve our material, presentations, and processes.

Q&A

What knowledge or recurring work could an agent make easier for your team?

- DO YOU NEED HELP?
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- Power Automate, Power BI, Power Apps, Azure, many other Microsoft services.
- Sunset legacy applications and automation, building new ones.
- Extended support for existing or new solutions.
- Training and education, increase user adoption.
- Let's just chat and see how we can help!