

M365 Copilot Agent Builder Prompt Coach Prompts

Put the following prompts in “**Prompt Coach**” Native agent. Take that output and put into “**Agent Builder**”

1. Customer Account Briefing Agent

WHY THIS IS IMPACTFUL

This agent brings scattered emails, chats, meetings, and documents into one clear customer briefing. It saves preparation time and helps teams walk into meetings informed and ready.

GOAL

Create a high-quality prompt for Microsoft 365 Copilot Agent Builder that builds an agent which prepares concise customer account briefings before sales or executive meetings.

CONTEXT

I am demoing Agent Builder to a semi-technical customer audience. The agent should show how Microsoft 365 Copilot can reason across emails, Teams chats, meetings, and documents to summarize what matters most before a customer conversation. The demo should feel practical, executive-ready, and immediately useful for sellers, account teams, and customer success managers.

SOURCE

Use Microsoft 365 content such as Outlook emails, Teams conversations, meeting transcripts, calendar events, OneDrive files, SharePoint documents, CRM-style notes if available, and recent customer-related materials.

EXPECTATION

Generate an Agent Builder prompt that instructs the agent to produce a structured briefing with: customer background, recent interactions, open issues, key stakeholders, business priorities, risks, recommended talking points, and suggested next actions. The prompt should include clear instructions, output format, reasoning boundaries, and a polished demo-friendly response style.

2. Meeting Follow-up and Action Tracker Agent

WHY THIS IS IMPACTFUL

We’ve all left meetings wondering, “Who owns what, and what happens next?” This agent turns the conversation into clear decisions, action items, owners, and next steps.

GOAL

Create a prompt for Microsoft 365 Copilot Agent Builder that builds an agent to turn customer meetings into clear follow-ups, action items, owners, and next-step communications.

CONTEXT

I need an impressive demo for a semi-technical audience showing how Agent Builder can automate post-meeting productivity. The agent should help users avoid manually reviewing meeting transcripts, chats, and notes. It should be useful for sales teams, project managers, consultants, and customer-facing teams.

SOURCE

Use Teams meeting transcripts, meeting recordings if available, chat messages, Outlook calendar details, shared files, meeting notes, Loop pages, OneNote notes, and related emails.

EXPECTATION

Generate an Agent Builder prompt that instructs the agent to summarize the meeting, extract decisions, identify action items with owners and due dates, flag unresolved questions, draft a follow-up email, and suggest tasks to create. The output should be structured, concise, professional, and suitable for showing how Copilot saves time after meetings.

3. RFP and Proposal Response Assistant Agent

WHY THIS IS IMPACTFUL

Here's where this agent really stands out: it pulls from past proposals, approved answers, product materials, and team conversations to speed up RFP responses while keeping content accurate.

GOAL

Create a prompt for Microsoft 365 Copilot Agent Builder that builds an agent to help teams respond to customer RFPs, security questionnaires, and proposal requests.

CONTEXT

I am presenting to customers who are semi technical and want to understand how Agent Builder can improve real business workflows. The agent should demonstrate document understanding, knowledge reuse, and drafting assistance. It should be impressive but realistic, showing how Copilot can help proposal, legal, sales, and technical teams work faster.

SOURCE

Use SharePoint proposal libraries, previous RFP responses, Word documents, PowerPoint decks, Excel pricing sheets, security documentation, product FAQs, customer emails, Teams discussions, and approved company messaging.

EXPECTATION

Generate an Agent Builder prompt that instructs the agent to analyze an RFP or questionnaire, identify required responses, find relevant approved content, draft answers, highlight gaps, flag legal/security review items, and produce a response tracker. Include guardrails to avoid inventing unsupported claims and to cite source documents where possible.

4. Customer Support Escalation Agent

WHY THIS IS IMPACTFUL

When a customer issue escalates, information is often scattered across emails, Teams, documents, and meetings. This agent brings it all together so teams can respond faster and communicate clearly.

GOAL

Create a prompt for Microsoft 365 Copilot Agent Builder that builds an agent to analyze customer support escalations and recommend resolution steps.

CONTEXT

I want a compelling demo for a semi-technical audience showing how Agent Builder can help teams respond faster to urgent customer issues. The agent should connect information from emails, Teams discussions, incident notes, support documents, and meeting history to create a clear escalation summary.

SOURCE

Use Outlook emails, Teams chats and channels, support case notes, incident reports, knowledge base articles, SharePoint documentation, meeting transcripts, and customer communication history.

EXPECTATION

Generate an Agent Builder prompt that instructs the agent to produce an escalation brief including issue summary, customer impact, timeline, current status, involved teams, suspected root cause, blockers, recommended next steps, customer-facing update draft, and internal action plan. The prompt should emphasize accuracy, source grounding, urgency, and professional communication.

5. Executive Business Review Preparation Agent

WHY THIS IS IMPACTFUL

Here's where the agent moves beyond task automation. It brings together outcomes, usage, risks, and opportunities so teams can lead smarter executive conversations.

GOAL

Create a prompt for Microsoft 365 Copilot Agent Builder that builds an agent to prepare Executive Business Review materials for customer meetings.

CONTEXT

I am demoing Agent Builder to customers and need a scenario that feels strategic and high value. The agent should show how Copilot can synthesize information across Microsoft 365 to help prepare for quarterly business reviews, executive check-ins, and customer success meetings.

SOURCE

Use emails, Teams conversations, meeting transcripts, PowerPoint decks, Excel usage reports, project plans, customer success notes, SharePoint documents, and previous business review materials.

EXPECTATION

Generate an Agent Builder prompt that instructs the agent to create an executive-ready summary covering relationship status, business outcomes, value delivered, usage or adoption trends, open risks, strategic opportunities, renewal or expansion signals, recommended agenda, and suggested executive talking points. The output should be polished, concise, and suitable for a semi-technical demo audience.