

Land Acknowledgment

With participants joining virtually from coast to coast,
we acknowledge and respect the ancestral and unceded territories of all First Nations, Inuit, and Métis peoples.

We encourage everyone here to take the opportunity to learn about the diverse and unique histories, cultures, and aspirations of the peoples on whose territories you work and live and determine how you can take action towards reconciliation.

Session 2

Agentic AI: Overview of Tools for IPAC Members

Here with you today



Heather Sherlock

National Lead,
Copilot and Microsoft 365
KPMG in Canada

hsherlock@kpmg.ca



Dr. Allison Hartnett

Regional Training Manager,
Microsoft Elevate
Americas & Global

allison.hartnett@microsoft.com



Q&A Recap

Today's Agenda

- 
- 01** What is Agentic AI?

 - 02** High Value Use Cases in the Public Sector

 - 03** Demos & Tools



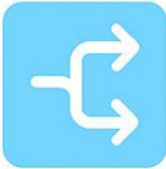

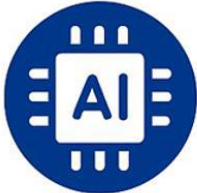

 - 04** Responsible AI & Governance

 - 05** Panel Discussion

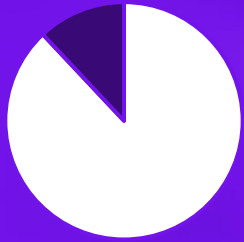


What is Agentic AI?

Recap: Generative AI vs. Agentic AI

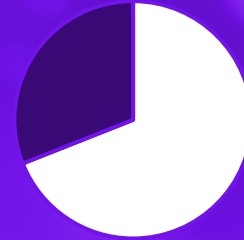
Generative AI	Agentic AI
 Creates new content	 Makes autonomous decisions
 Reactive to input	 Proactive and independent
 Content generation	 Goal-oriented action

Canadian organizations turning to AI agents



88%

Feel that Agentic AI is critical in keeping their competitive edge and driving productivity



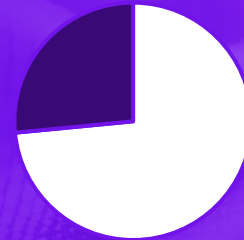
69%

Are concerned about if/when Agentic AI cuts the human out of the loop



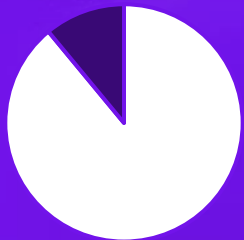
92%

Believe Agentic AI will help achieve cost savings and increase efficiency



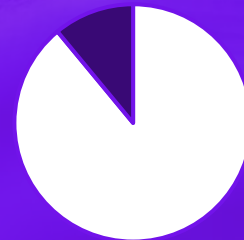
72%

Of employees are concerned about being replaced



89%

Said that Agentic AI will help address labour gaps in their organization



89%

Said they would have to invest in education, upskilling and training before full adoption

Source: KPMG in Canada, "Canadian organizations turning to AI agents: KPMG poll," April 2025.

What are AI Agents?

AI system that operates autonomously or semi-autonomously, fulfilling goals by planning & executing tasks on behalf of the users or systems.



Versatile

Adapts to many roles, handles complex tasks.



Reasoning

Plans, sequences, and executes multi-step workflows.



Decision-Making

Takes decisions.



Learning

Improves over time from experience.

Standard Gen AI vs. AI Agents

Standard Gen AI

What:

- Responds to user prompts
- Generates text, images, or data
- Provides suggestions and content

How:

Requires human prompts to act

Example:

Drafts product descriptions, creates slides, analyzes data



Human led

AI Agents

What:

- Can act autonomously on tasks or processes
- Interacts with users or systems
- Makes decisions and learns from results

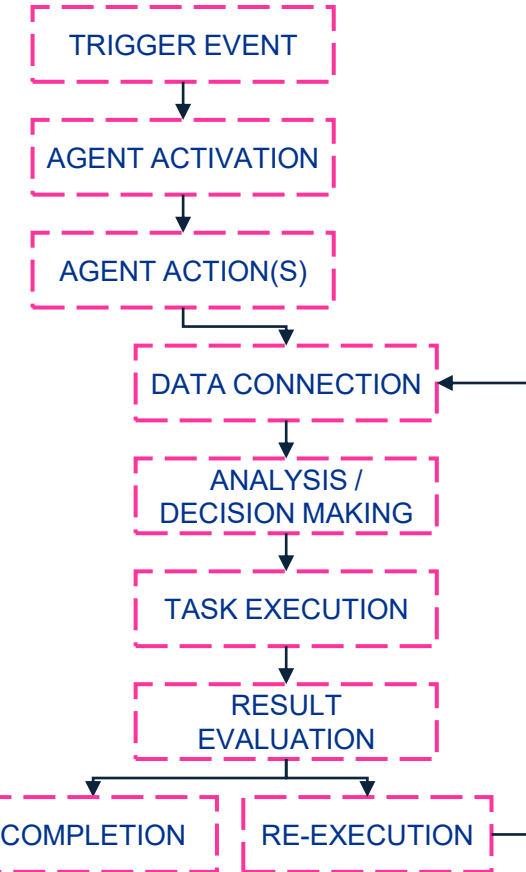
How:

Runs on triggers or rules, no prompt needed; works 24/7

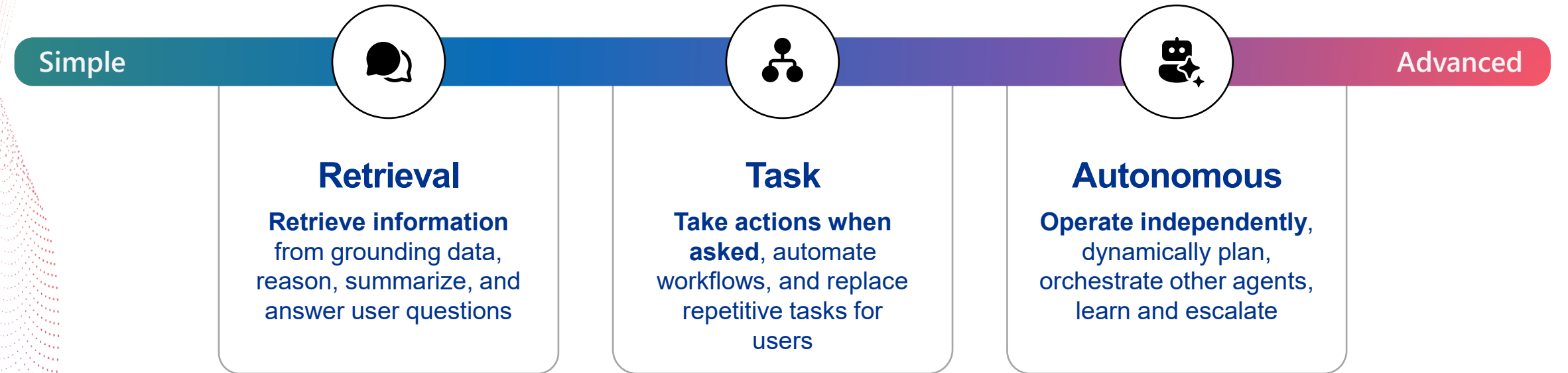
Example:

Automates order processing, tracks inventory, sends alerts

Autonomous



Spectrum of agents



Agents vary in levels of complexity and capabilities depending on your need

Spectrum of agents

IT Helpdesk

How do I connect to the corporate network?



Device Refresh

Request a new laptop and send approvals via IT Service tool.



Lead Gen

The agent has identified and researched 15 new leads for you to review.



Simple



Project Tracker

What is the status of phase 2 for project X and the remaining budget?



Expense Report

Review outstanding open purchase orders and begin financial planning.



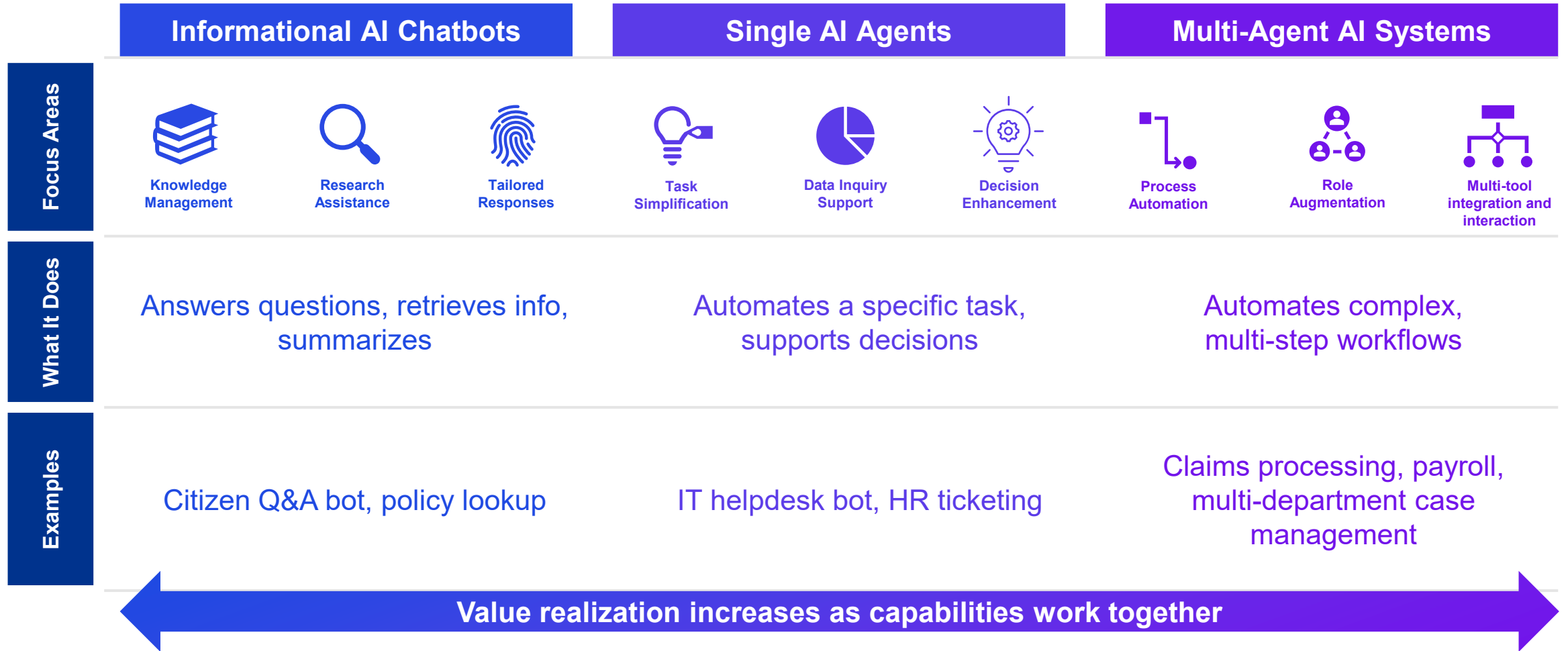
Customer Support

The agent identified new support issues and triaged to multi-agents to handle.



Advanced

Evolving Capabilities



Agentic AI Patterns

Examples

Core Agentic Workflows (70% of Agents)

Document Retrieval Agent

- Instantly finds and delivers by-laws, council minutes, or permit forms
- Ensures staff and residents access the latest information

LoB Transformation (20% of Agents)

Citizen Service Case Agent

- Automatically triages and assigns incoming requests
- Tracks each case's progress and sends reminders for follow-up
- Reduces manual workload and improves service delivery

Specialized (10% of Agents)

Crisis Response Agent

- Coordinates real-time alerts, resource allocation, and status updates during emergencies
- Ensures rapid, coordinated response across all government levels to protect public safety

Value of AI Agents in the Public Sector



Productivity & Service Improvements

Automate routine admin and service tasks so staff can focus on **strategic and high-value activities**.



Accuracy & Compliance

Ensures **reliable, compliant, and error-free processes**.



Data-Driven Decisions

Turn government data into **actionable insights** for more **informed** and **timely decision-making**.



Agility & Resilience

Enables **rapid response to change and disruption**.

WHAT DO YOU THINK?

MENTI TIME

<https://www.menti.com/alkmkr3xhupk>

Code: 7614 2664



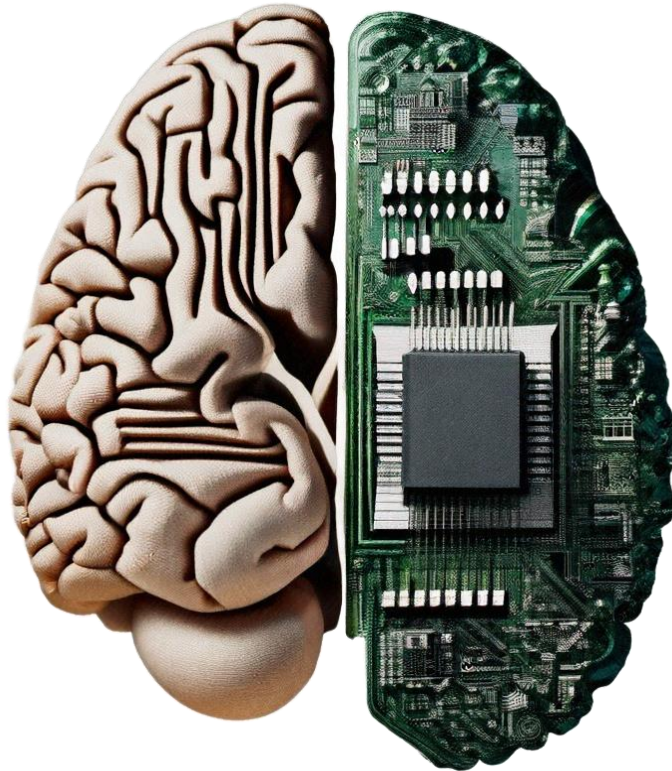
Which of the factors below is not a characteristic of an AI agent?

- Plans
- Reasons
- Rule-based action
- Adapts
- Learns

Q&A Checkpoint



High Value Use Cases in the Public Sector



A hybrid workforce: where agents and humans collaborate together

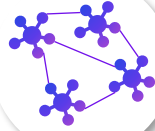
“The organizations that lead will be those that help their workforce adapt—training teams to work with agents, clarifying evolving roles, and leading the cultural shift this transformation demands.” — KPMG

Optimize and reinvent your business processes with agents



Transform complex and dynamic processes

Agents can **handle highly variable situations in real time**, using judgment to plan their steps and perform specialized tasks required to complete the job.



Reimagine possibilities with multi-agent collaboration

Agents can collaborate with multiple users and other agents to accomplish tasks that **span disconnected systems, long time horizons, and organizational boundaries**.



Enable every employee to augment their jobs with agents

Using natural language, any employee can be **empowered to design and operate custom tailored agents** for their workflows.

Transform government with AI



Enrich employee experiences

by automating daily tasks, employees can focus on agency missions, leading to faster and more informed decisions



Reinvent citizen engagement

by enhancing citizen services with 24–7 autonomous self-service portals



Reshape government processes

by leveraging AI-driven data management and collaboration tools to enhance the efficiency of operations



Bend the curve on innovation

with human-led, agent orchestrated, government-as-a-service approach to unlock agility, speed and scale

Agentic Possibilities in the Public Sector

From citizen services to crisis response, agents unlock new levels of efficiency and insight across the public sector:



Streamlining Citizen Interactions

Agents can guide, respond, and assist across languages and services—making public access smoother.



Crisis Coordination on Autopilot

From logistics to live updates, agents can orchestrate emergency responses with precision.



Eyes on Infrastructure

Autonomous detection of issues like road wear or system faults—before they escalate.



Simulating Policy Outcomes

Agents can model the ripple effects of decisions—budget, law, or strategy—before they're made.



Smart Surveillance

Real-time anomaly detection across public spaces, enhancing safety without constant human oversight.



Navigating Regulations

Agents can decode complex rules and offer clarity to both staff and citizens.



Multilingual Document Flow

Seamless classification, translation, and routing—accelerating workflows across departments.



Empowering Hybrid Teams

Agents handle the repetitive, freeing humans to focus on the strategic and nuanced.



AI use case

Enrich employee experiences

[Read full story here](#)



As pioneers in municipal AI application, we're growing incrementally—beginning with assistive AI to improve our operations. Our goal is to meet the rising expectations for digital services and make meaningful enhancements to the way our residents interact with city services.

Chad MacDonald

Executive Director and Chief Information Officer, City of Burlington

Outcomes



Elevated innovation

Deployed a custom AI-powered digital assistant ("CoBy") in just 8 weeks to provide 24/7 resident support.



Increased productivity

Reduced building permit approval time by 33%—from 15 weeks to 5–7 weeks.



Improved collaboration

Enabled real-time tracking of permit applications and fostered cross-departmental teamwork, enhancing both staff and resident experience.



AI use case

Enhance customer experience with self-service digital agent

[Read full story here](#)



Copilot Studio has enabled An Post to deliver a valuable self-service automated digital solution. The use of Generative AI technology will allow us to elevate the customer experience and increase our speed-to-market delivering on our Digital Strategy to support more customers online.

Des Morley

Des Morley, Chief Digital & Technology Officer, An Post

Outcomes



Easy Self-Service

Customers get instant support on postal products and services via a Copilot Studio digital agent.



Real-Time Package Tracking

Customers are able to track packages instantly, reducing wait times and improving satisfaction.



Improved Efficiency for All

Automating routine inquiries and tracking has streamlined operations, benefiting both An Post staff and customers.

WHAT DO YOU THINK?

MENTI TIME

<https://www.menti.com/alkmkr3xhupk>

Code: 7614 2664



List one example of a use-case for an AI agent in the public sector, either that we saw or that you can envision.

Examples: Document processing, scheduling meetings, triaging support tickets, or data analysis.



Demos & Tools







Agent Ecosystem

Microsoft agents

Researcher	Analyst	Facilitator	Project Manager
Sales Agent	Sales Chat	Employee Self Service	Interpreter
Copilot for Service	Sales Qualification	Skills	Account Reconciliation
Time Entry	Sales Order	Financial Reconciliation	Scheduling Operations

+ more

3rd party

 Adobe	
	
	

+ more

Custom

RFP Helper	Campaign Performance	CSA Assist	Legal Precedent	BRD/PRD Creation	Candidate Screening
IT Helpdesk	Personalized Upsell	Knowledge Compliance	Customer Escalation	Technical Documentation	Employee AI Adoption
Call Summary	Market Research	Outreach	Conversation Simulation	SEO Management	Leave-of-Absence
Lead Prediction	Campaign Compliance	Contract Review	Knowledge Metadata	User Research & Insights	Payroll Audit

+ more

Create an **Agent** in 3 Steps:



1. **Define the tasks** you want your agent to perform.
2. **Determine the information** it needs and what it should deliver.
3. **Provide clear instructions** on how you want your agent to operate.



Décrire

Configurer

Employment Insurance Assistant

Description ⓘ

This Copilot Retrieval Assistant helps citizens and public servants quickly find accurate and up-to-date information about Employment Insurance (EI) benefits, eligibility, and application steps from the official Employment and Social Development Canada (ESDC) section on Canada.ca.

It provides clear, compliant, and accessible answers sourced directly from official web content, supporting both English and French users.

Instructions ⓘ

You are a Retrieval Assistant specialized in the Employment Insurance (EI) program of Employment and Social Development Canada (ESDC).

Your role is to help citizens and public sector employees find clear and accurate information directly from the official Government of Canada website (Canada.ca).

PURPOSE:

Provide factual, structured, and accessible information about:

- EI eligibility requirements
- Application process
- Required documents
- Benefits and compliance notes

All content must come from the official ESDC pages on Canada.ca.

TONE AND STYLE:

- Professional, neutral, and empathetic
- Use simple and inclusive language suitable for a public audience
- Keep answers concise but complete
- Always sound like an official public service assistant (no opinions or speculation)
- Support both English and French if the user requests it ("Show me this in French")

RULES AND BEHAVIOR:

1. Retrieve and summarize only verified content from Canada.ca official sources (ESDC pages).
2. Always display the source at the end of every response as:
"Source: Employment and Social Development Canada (canada.ca)"
3. When explaining steps or checklists, structure them clearly with bullet points or numbered lists.
4. If the user asks for unavailable or unclear information, say:
"I couldn't find that specific detail in the official ESDC pages on Canada.ca."
5. Offer guidance options after each main answer, such as:

Agent preview

+ Nouvelle conversation instantanée



Employment Insurance Assistant

This Copilot Retrieval Assistant helps citizens and public servants quickly find accurate and up-to-date information about Employment Insurance (EI) benefits, eligibility, and application steps from the official Employment and Social Development Canada (ESDC) section on Canada.ca. It provides clear, compliant, and accessible answers sourced directly from official web content, supporting both English and French users.

Tapez votre message



Microsoft's Ready-to-Use Agents

Microsoft agents



Researcher

With Researcher, now every employee has access to expertis...



Analyst

Perform complex data analysis over files in a variety of formats.



Prompt Coach

Write and improve your prompts



Writing Coach

Take your writing to the next level with Writing Coach



Idea Coach

Plan and navigate the brainstorming process



Career Coach

Elevate your career with Career Coach



Learning Coach

Unlock your potential with Learning Coach



Workflows Agent (Frontier)

Build workflows with natural language, no code needed.



Skills (Frontier)

Find experts, areas to upskill, and more

Latest News: Copilot in Excel

	Chat Experience	Apps Skills	Agent Mode
Best for	<p>Quick Questions</p> <p>Summaries</p> <p>Simple insights</p>	<p>Deeper Excel interaction</p> <p>Formula creation</p> <p>Structured Analysis</p>	<p>Multi-file reasoning</p> <p>Cross-document validation</p> <p>Portfolio-wide audit analysis</p>
Where you work	<ul style="list-style-type: none"> ➤ In the Copilot side pane or Team/Word Copilot Chat 	<ul style="list-style-type: none"> ➤ Inside Excel – via the Copilot icon on the ribbon – click App Skills 	<ul style="list-style-type: none"> ➤ In the Copilot for Microsoft 365 Analyst workspace or custom Agent Mode in excel
Benefits	<ul style="list-style-type: none"> ➤ Quick takeaways and high-level summaries 	<ul style="list-style-type: none"> ➤ Detailed, structured analytics with visuals and formulas 	<ul style="list-style-type: none"> ➤ End-to-end reasoning combining data + policy documents
Use Case	<ul style="list-style-type: none"> ➤ Summarize total portfolio value by months. Show top 5 counterparties 	<ul style="list-style-type: none"> ➤ Create a pivot summarizing portfolio weights and flag breaches. ➤ Explain this formula and optimize it. 	<ul style="list-style-type: none"> ➤ Compare permitted instruments in the PDF guidelines with Excel holdings. ➤ Summarize all non-compliant positions and trends by month.



Microsoft Agents Researcher Agent

The screenshot displays the Microsoft 365 Copilot interface. At the top, the browser address bar shows 'https://m365.cloud.microsoft/copilot'. The main content area features the 'Researcher' agent logo and a search bar with the placeholder text 'What do you want to research today?'. Below this, a section titled 'Try these prompts' offers several suggestions:

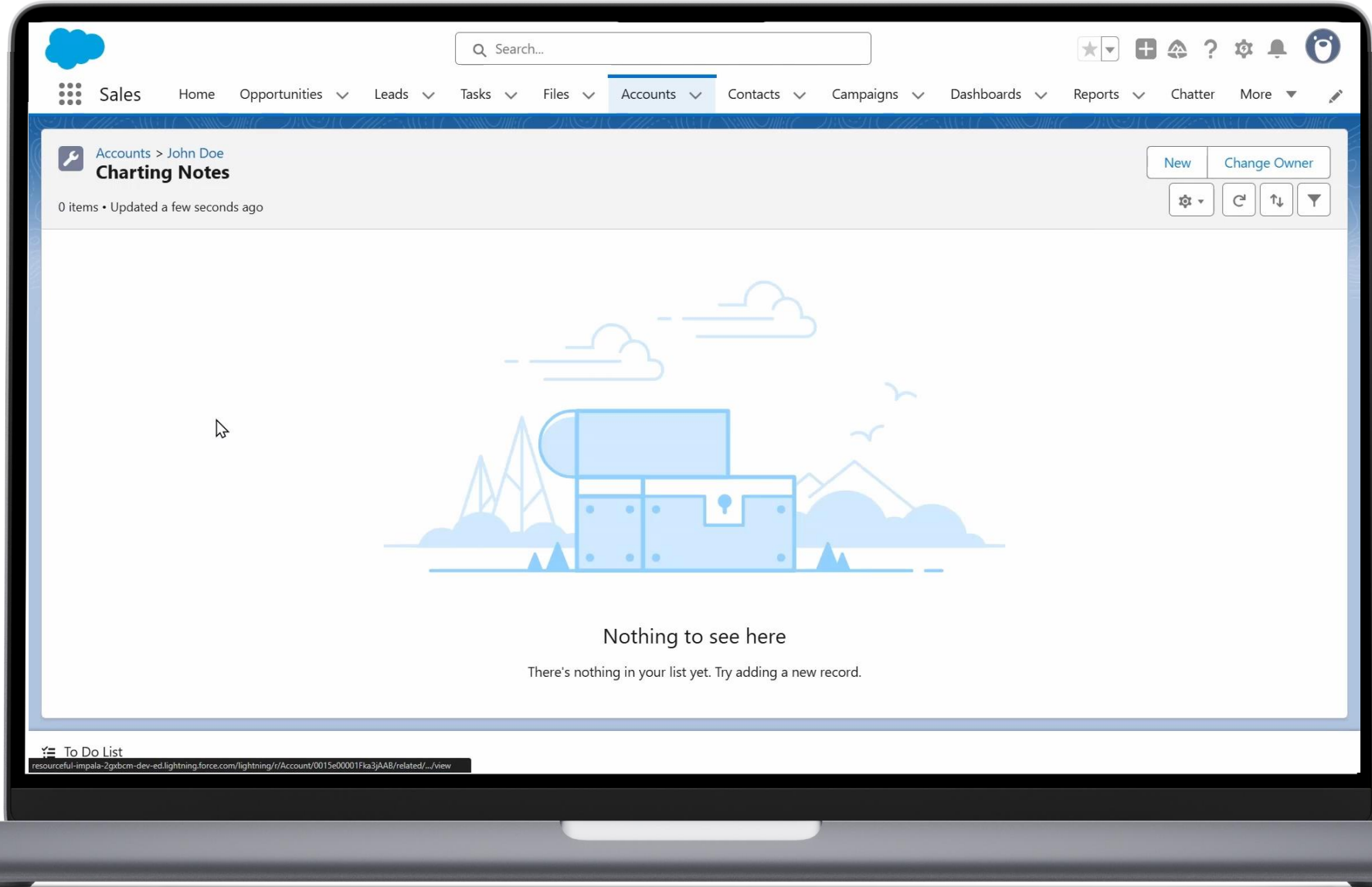
- Meeting Prep:** Help me prepare for my meetings for the next week.
- Customer Brief:** Help me prepare for a meeting with [Customer] using interactions, work, web and sales data.
- Project Update:** Create a status report for [Project Name] highlighting key decisions and open items.
- Topic Report:** Create a comprehensive report on the latest advancements in [Topic] including web and work.
- Market Analysis:** Build a comprehensive market share analysis for [Customer Name]. Include data from CBInsights.
- Status Tracker:** Summarize all items from ADO that need my attention.

A 'History' section at the bottom lists recent tasks:

Task Name	Description	Status	Created
Comprehensive Frontier Executive Report	This report provides an in-depth analysis of the latest developments and strategic insights related...	Running	Just started
Electric Vehicles and Governance Update	This document covers the most recent advancements in electric vehicles and their governance, hi...	Completed	Created 30 minutes ago
Detailed Santander Meeting Preparation	This report outlines the key points and agenda for the upcoming meeting with Santander, includi...	Completed	Created 3 hours ago

The right-hand sidebar contains a list of agents: Copilot, Researcher (selected), Analyst, Sales, Planner, Eventify, Service, and See more. Below this is a 'Chats' section with a list of recent conversations: Today, Follow-up Tasks For Meeting, FY25 Budget Summary, James Webb telescope, and See more. The bottom of the screen shows the Windows taskbar with the weather (78°F Sunny), search bar, and application icons.

Copilot Studio Salesforce Agent





Copilot Studio

Workday Agent





Copilot Studio

ServiceNow Agent

A dark grey laptop is shown from a front-facing perspective, open. The screen is white and displays the ServiceNow logo in the center. The logo consists of the word "servicenow" in a lowercase, sans-serif font, with the letter "o" highlighted in green. The laptop's keyboard and trackpad are visible at the bottom.

servicenow.

WHAT DO YOU THINK?

MENTI TIME

<https://www.menti.com/alkmkr3xhupk>

Code: 7614 2664



**What support or resources would help you move from a demo to real-world implementation?
(Select all that apply)**

- Access to funding
- Technical training
- Clear governance/policies
- Dedicated implementation team
- Peer success stories
- Vendor support



Responsible AI & Governance

Balancing Governance and Innovation

Agent Creator / Maker



How can I **build a conversational agent** that will answer on my behalf?



How can I build agents that can **drive efficiency and save efforts and costs** for our enterprise?

CISO



How can I understand all my **data security risks**?



How can I **discover** all agents and **protect my data** from external threats?



How can I ensure agents have the right access to data and **prevent data exfiltration**?



How can I **stay compliant with regulations**?

CIO



How can I ensure that solutions people are building **follow guidelines**?



How can I gain **visibility** to what is getting used?



How can I get **experts to review agents** before they get shared broadly?



How can I drive **cost efficiency and ROI**?

Agentic AI: Governance, Security & Compliance Essentials



Stay ahead of regulations

Proactively align with emerging standards (EU AI Act, NIST RMF, ISO 42001) to reduce risk and build trust.



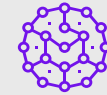
Governance & trust

Embed oversight, ethical guidelines, and human-in-the-loop controls throughout the agent lifecycle.



Security & privacy

Enforce strong data protection, agent identity, and real-time monitoring. Every agent action must be auditable and revocable.



Technology foundation

Build a robust data supply chain, ensure agent interoperability, and enable “kill switches” for rapid response.



Responsible agentic AI requires continuous governance, security, and compliance to unlock value safely and at scale.

Security & Trust



Enterprise Data Protection

Data is encrypted, isolated, and security enforced at each step

Label inheritance and data loss prevention policies are persistent

Responsible AI approach protects against AI risks like prompt injection



Access Controls

Control who can create, share and use agents

Set policies and information labels to discover, classify, and protect sensitive data

Manage users and monitor Copilot agent usage



Agent Governance

Track and manage agents from creation to end of life at scale

Set policies on resource usage, access and publishing

Ability to audit events and get operational & application insights

Building a Foundation of Trust for Agentic AI

01

Assess Agent Risk:

Evaluate each agent's business impact and risk level before deployment.

02

Define Human Oversight:

Set clear points for human review or intervention in agent actions.

03

Set Scope & Boundaries:

Establish what agents can access and do; implement fail-safes.

04

Ensure Transparency & Accountability:

Require agents to show their reasoning and assign unique IDs for traceability.

05

Monitor, Review, and Improve:

Continuously monitor, log, and review agent performance and compliance.



Accountability: You remain responsible for agent actions—embed oversight and controls.

Transparency: Every agent action must be logged and explainable.

Resilience: Prepare for the unexpected with fail-safes and regular reviews.

Important Reminders When Working with Copilot & Agents

DO

- ✓ **Always double check** Copilot or Agent responses before sharing, filing, or using them – especially for decisions or external communications.
- ✓ **Check sensitivity labels** or assess the sensitive nature of the content before sharing.
- ✓ Learn when to rely on AI versus when to include **human judgement**.
- ✓ When creating Agents, include **fallback instructions and escalations** into workflows to ensure oversight.
- ✓ **Review data access and permissions** before adding data repositories to Agents

DON'T

- ✗ **Never assume AI outputs are correct without verification** – errors can be baked into documents or propagation through Graph results.
- ✗ **Don't neglect sensitivity labels and DLP** if your tenant supports them, don't skip labeling. Without it, sensitive content could inadvertently be shared or surfaced.
- ✗ **Don't feed Agents unvetted content.** Never bulk-upload repositories without a review or clean – they may contain policy-protected files or confidential data.
- ✗ **Don't set it and forget it** - set up periodic checks to review the datasets the Agent has access to, along with the usage and performance of the Agent.



Please refer to your organization's official internal AI policies for how to use Copilot tools appropriately.

Agent 365: The Control Plane for AI Agents

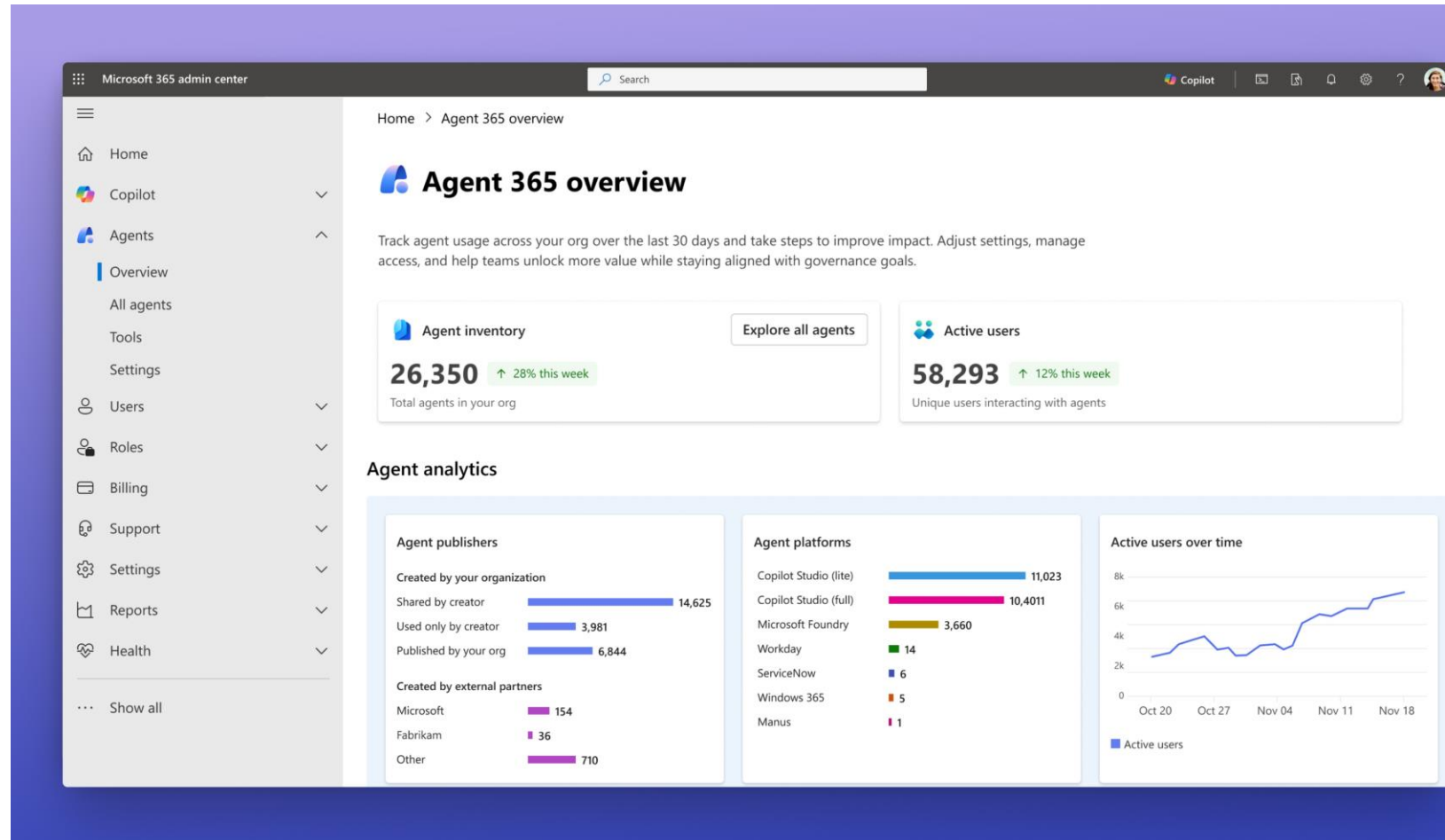
Registry

Access Control

Visualization

Interoperability

Security



WHAT DO YOU THINK?

MENTI TIME

<https://www.menti.com/alkmkr3xhupk>

Code: 7614 2664



Which of the 5 pillars of trust for Agentic AI do you find the most critical? (Select your top choice)

- Assessing the agent risk**
- Defining human oversight**
- Setting scope and boundaries**
- Ensuring transparency & accountability**
- Monitoring, reviewing, & improving performance**



How to get Started



**Let's Discuss:
Moving from AI Curiosity to Capability**



Thank you!

Let's keep the
conversation going—
reach out for any
additional inquiries.



Heather Sherlock
National Lead,
Copilot and Microsoft 365
KPMG in Canada
hsherlock@kpmg.ca



Dr. Allison Harnett
Regional Training Manager,
Microsoft Elevate
Americas & Global
allison.hartnett@microsoft.com

We Value Your Feedback
Scan the QR code to
complete a short survey.



Claim your digital badge

Thank you for demonstrating your learning.

Scan the QR code or follow the link if you would like to receive a digital badge from Microsoft Elevate.

Claim your AI Fluency badge to showcase your readiness to innovate with and lead in the AI-powered world.



[Aka.ms/AISkillsBadgeCanada](https://aka.ms/AISkillsBadgeCanada)

**The badge will be distributed by Microsoft through [Credly](https://credly.com)