

## **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 3

# Agentic AI: Overview of Tools for IPAC Members

# Here with you today



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# Today's Agenda



**01** What is Agentic AI?

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**02** Demos & Tools

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**03** Live Demo

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# What is Agentic AI?

# Generative AI vs. Agentic AI

## Generative AI



Generates Content



Requires Prompt  
to Initiate

## Agentic AI



Goal-Oriented



Adaptive



Decision Making



Integrative

# 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

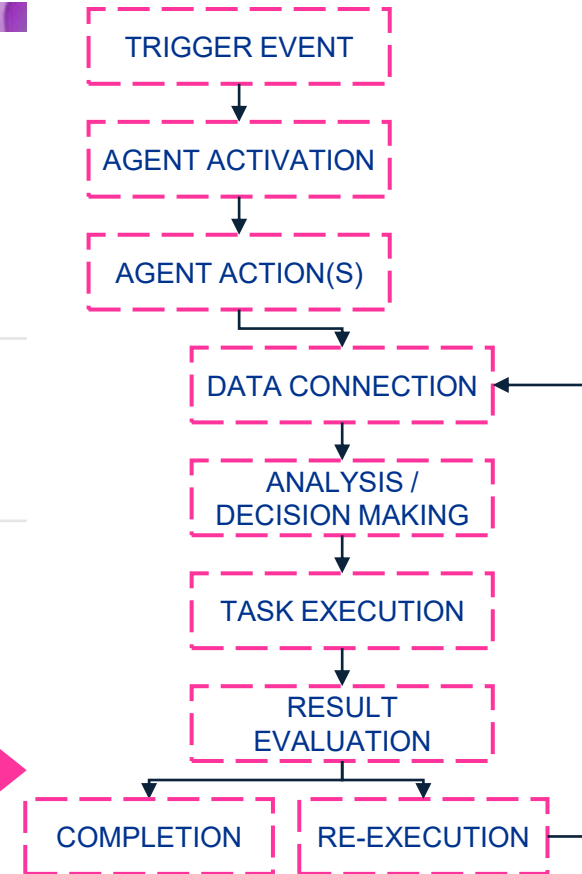
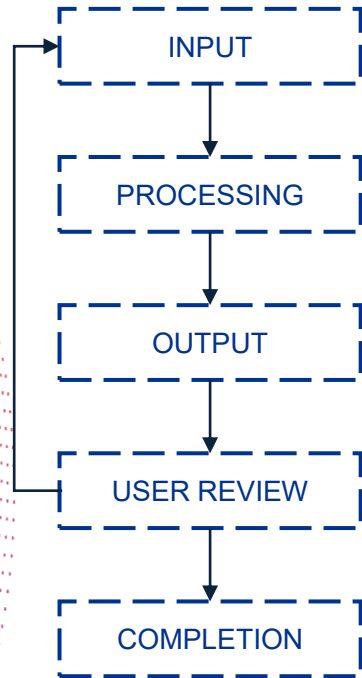
### How:

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

### Example:

Automates order processing, tracks inventory, sends alerts

Autonomous



# Spectrum of agents

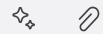


← Agents vary in levels of complexity and capabilities depending on your need →

# Spectrum of agents

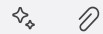
## IT Helpdesk

How do I connect to the corporate network?



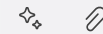
## Device Refresh

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.

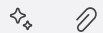


Simple



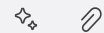
## Project Tracker

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

WHAT DO YOU THINK?  
**MENTI TIME**

<https://www.menti.com/alcbf4mr4xoh>

Code: 2798 4147



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

- Can automate tasks
- Can run 24/7
- Requires a prompt to initiate
- Can integrate with other systems
- Can process multi-step tasks

# 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**.

# Important Reminders When Working with Copilot & Agents

## DO

- ✓ **Review AI responses before sharing or using them.** Treat outputs as drafts - especially for decisions or external communications.
- ✓ **Be mindful of sensitive information.** Pause before entering or sharing content that includes personal, confidential, or policy-sensitive information.
- ✓ **Use professional judgement.** AI supports your work – it does not replace your expertise.
- ✓ 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** – AI can make errors or miss context – always validate!
- ✗ if your tenant supports them, **don't skip labeling your sensitive content.** 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.

WHAT DO YOU THINK?

# MENTI TIME

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**Which practice is critical to reduce risk when using AI agents in your day-to-day work?**

- Reviewing outputs**
- Being mindful of sensitive information**
- Setting clear fallback and escalation instructions**
- Regularly reviewing access and permissions**
- All of the above**



## Ireland's National Postal Service

*Enhanced customer experience with self-service digital agent*



### Challenge

High volumes of routine customer inquiries (e.g., package tracking, service questions) were placing pressure on support teams.

### Solution

An Post used Copilot Studio to build a self-service agent that provides instant answers and real-time package tracking through conversational interactions.

### Outcomes



24/7 responses with structured guidance



Real-Time Parcel Tracking



Staff freed up to focus on complex high-value cases

WHAT DO YOU THINK?

# MENTI TIME

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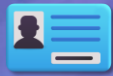
List one example of a use-case for an AI agent in the public sector that you can envision.

# Q&A Checkpoint



# Demos & Tools

# Which Copilot do you have?



**Visitor  
Pass**



**Building  
Access**



**Full Security  
Clearance**

Hi there. What should we dive into today?

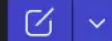
Message Copilot

- Create an image
- Recommend a product
- Improve writing
- Take a quiz
- Write a first draft
- Draft an email
- Craft a story
- Learn something new



Auto ▾



New chat

Search

Library

Create

Agents

Sales

Government Policy Assistant

New agent

All agents

Chats



Help me get up to speed on the G...

Help me prepare for this meeting ...

Help me prepare for this meeting ...

Apps

Sasha Ouellet



Copilot Chat (Basic) ⓘ

# Welcome, how can I help?

+ Tools



Offer strategies to mitigate risks identified in file

Fix risks from doc



Rewrite this to sound more professional and less verbose:...

Improve your writing



Provide guidance on prioritizing tasks from file for maximum...

Prioritize tasks

See more ▾



Work

Web

Auto



New chat

Search

Library

Create

Agents

Researcher

Analyst

Frontline Agent (Preview)

Topic Brief Generator

New agent

All agents

Notebooks

IPAC Agents Presentation

All notebooks

Chats



Catch up on...

All chats

Apps

Heather Sherlock



M365 Copilot

# Hi, I can help you recap and prep for meetings



Message Copilot



Tools



Recap Agents Brainstorming Session

You might have missed



Help me prepare for Project Alpha Standup

Coming up



Create a concise project update message for the leadership.

See more







# 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

# 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: Agent Mode in Apps

	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"> <li>➤ In the Copilot side pane or Teams / Word Copilot Chat</li> </ul>	<ul style="list-style-type: none"> <li>➤ Inside Excel / Word / PPT etc. via the Copilot icon on the ribbon → App Skills</li> </ul>	<ul style="list-style-type: none"> <li>➤ In the Copilot for Microsoft 365 Analyst workspace or custom Agent Mode in Excel</li> </ul>
Benefits	<ul style="list-style-type: none"> <li>➤ Quick takeaways and high-level summaries</li> </ul>	<ul style="list-style-type: none"> <li>➤ Detailed, structured analytics with visuals and formulas</li> </ul>	<ul style="list-style-type: none"> <li>➤ End-to-end reasoning combining data and policy documents</li> </ul>
Use Case	<ul style="list-style-type: none"> <li>➤ Summarize total portfolio value by months</li> <li>➤ Show top 5 counterparties</li> </ul>	<ul style="list-style-type: none"> <li>➤ Create a pivot summarizing portfolio weights and flag breaches</li> <li>➤ Explain this formula and optimize it</li> </ul>	<ul style="list-style-type: none"> <li>➤ Compare permitted instruments in PDF guidelines with Excel holdings</li> <li>➤ Summarize all non-compliant positions and trends by month</li> </ul>

# 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.

# Live Demo

## **Rapid Topic Briefing Agent:**

Building an Agent that helps you get up to speed quickly on unfamiliar policy, programs or topics specific to the Canadian public sector.

WHAT DO YOU THINK?

# MENTI TIME

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**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



# Thank you!

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



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



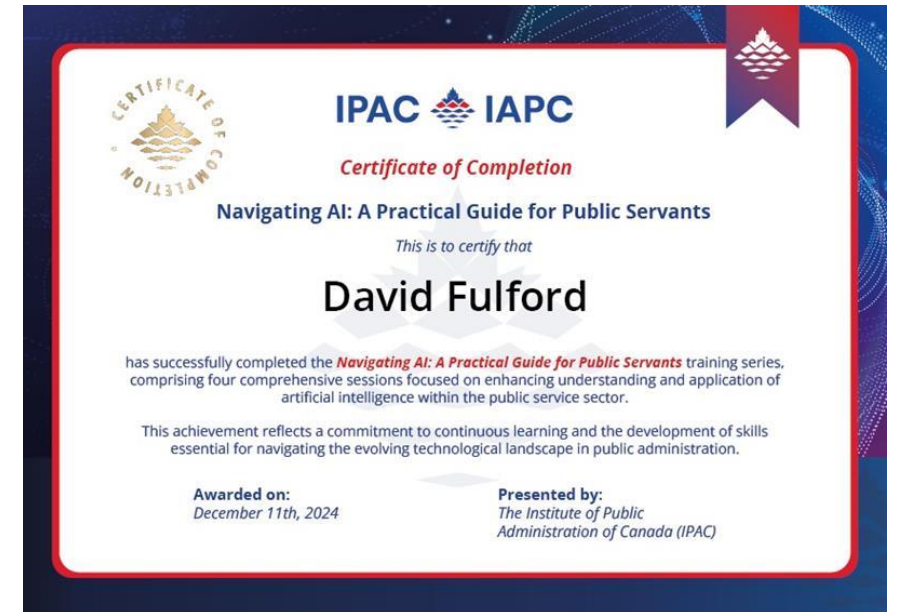
# Navigating AI: Age of the Agent for Public Service

## Certificate of Completion

Participants who complete **all three workshops** will receive a certificate of completion, demonstrating their newly acquired AI skills.

All session viewings must be completed by **April 1<sup>st</sup>** to be eligible for a certificate. **Certificates will be issued after April 1<sup>st</sup>.**

Please be advised that IPAC cannot respond to certificate-related inquiries or update requests before **April 1<sup>st</sup>.**



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