TECH CON

AI Agents

Putting your work on Autopilot

DON'T HAVE THE APP?

Download it here.

Scan to check-in or use code:

Agents1

TECH CON

Your 30 minutes

Stop chatting with AI. Start delegating to it.

You leave with one working Agent that answers from your documents.

You leave with a shortlist of three tasks worth automating this quarter.

You see the difference between a chatbot and an agent.

TECH CON

Chatbot vs. Agent

Chatbot
Reads and responds. Talks.
Context one conversation only.
Direction you ask, it answers.
Examples ChatGPT, Copilot Chat.
Best for drafting, brainstorming, lookup.

Agent
Plans and takes action. Does the work.
Context across steps and sessions.
Direction you set a goal, it executes.
Examples Copilot Studio, Custom GPTs with tools.
Best for policy Q&A, triage, multi-step workflows.

Build a Copilot Agent

1. Open portal.office.com → Copilot → "New Agent".
2. Name it for ONE job (e.g., "Policy Q&A Bot", "Onboarding Concierge").
3. Write a CRIT instruction: Context, Role, expected questions, Task format.
4. Upload 1-2 reference docs (SOP, FAQ, handbook) from your table.
5. Add one trigger phrase and one topic (e.g., "PTO Policy").
6. Test with 3 questions. Refine. Add escalation to a human.

Bring the document you wish your team would stop emailing you about.

Build a Gemini Gem

1. Go to gemini.google.com → left sidebar → "Gems" → "New Gem".
2. Give it a Name and short Description for ONE job (e.g., "Policy Q&A Bot").
3. In Instructions, write a CRIT prompt: Context, Role, expected questions, Task format.
4. Under Knowledge, upload 1-2 reference docs (SOP, FAQ, handbook) from your table.
5. Use the Preview panel on the right to test with 3 questions; refine instructions.
6. Click Save. Pin the Gem so it appears in your sidebar; add an escalation line ("If unsure, reply: 'Ask <Name> in #help'").

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Build a ChatGPT GPT

1. Go to chatgpt.com → sidebar → "GPTs" → "Create" (requires Plus, Team, or Enterprise).
2. Open the "Configure" tab. Set Name and Description for ONE job (e.g., "Onboarding Concierge").
3. In Instructions, paste a CRIT prompt: Context, Role, expected questions, Task format.
4. Under Knowledge, upload 1-2 reference docs (SOP, FAQ, handbook); leave Capabilities at default.
5. Add 3-4 Conversation Starters so users know what to ask first.
6. Test in the Preview pane with 3 questions, refine, then Save and share via "Only me" or "Anyone with the link".

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Where agents earn their keep

Customer-facing

Support triage first-response & FAQ deflection.

Guided discovery qualify leads before handoff.

Onboarding personalized walkthroughs.

Field example: a 50-person service firm cut response time 30% with a triage agent.

Internal ops

HR Q&A PTO, benefits, policy on demand.

IT deflection password resets, access, tickets.

Finance expense approvals, close checklists.

Pick first: high volume, low stakes, well-documented. Skip PII/PHI on iteration one.

Thank you!

COMING UP NEXT: LUNCH | GRAND FOYER