

Playbook: Create an Executive Voice Agent

Contents

Introduction.....	1
Use Cases.....	1
Tone & Style Guidelines.....	2
Security & Testing	2
Low-code agent options using Agent Builder or Copilot Studio	2
Agent Builder Overview.....	2
Step by step process with Agent Builder	2
Copilot Studio Overview.....	4
Step-by-Step Setup for Executive Voice Agent	4
Going further – adding actions and workflows	5
Licensing Overview.....	5
Example Prompts & Best Practices	6
Going further:	7
Appendix:.....	8

Introduction

Building an executive voice agent helps organizations quickly create content that authentically reflects the leader's voice and maintains consistent messaging. By weaving executive style into AI-driven interactions, every communication supports your brand's principles and strengthens trust with stakeholders, enhancing both organizational identity and engagement.

Use Cases

Drafting executive blogs and social media posts, company-wide email communications, preparing keynote scripts, and Q&A guidance & responses.

- **Authenticity at Scale:** Agents embed your executive's voice into every draft, ensuring all communications—whether a LinkedIn post or a keynote script—are consistent with your brand values.
- **Efficiency:** Agents reduce the time needed to produce high-quality executive communications, enabling faster responses to business needs and events.
- **Enhanced Engagement:** By leveraging archives of executive speeches and messaging frameworks, agents personalize content for different audiences while keeping the message fresh and relevant.

Tone & Style Guidelines

Set tone and style guidelines that reflect your brand. Agents help enforce these standards by automatically applying the right voice, perspective, and clarity to every draft, whether it's an org-wide email, a newsletter, or a blog post.

Security & Testing

Strong security in executive voice agents safeguards interactions and maintains reliability. Configuring compliance guardrails ensures adherence to standards and privacy requirements, while secure connectors and data protection demonstrate a commitment to privacy. Regular updates keep communications aligned with leadership goals and foster trust.

Low-code agent options using Agent Builder or Copilot Studio

Two frameworks shape how you build an Executive Voice Agent: Agent Builder and Copilot Studio.

Agent Builder is fast and simple—ideal for quick pilots like LinkedIn posts or internal messages. Copilot Studio offers enterprise-grade customization with workflows, connectors, and governance for multi-channel deployment. Together, they balance speed and scalability while preserving the executive's authentic voice.

To decide which agent to use for your specific scenario:

1. Define the Use Case

- Identify the executive voice scenario
- Determine if it's **productivity-focused** (M365 Copilot) or **action-taking** (Copilot Studio/Developer Track).

2. Choose the Build Path

- Internal users + Graph data only → M365 Copilot
- Custom workflows, APIs, non-M365 channels → Copilot Studio Full

Agent Builder Overview

Agent Builder is a lightweight tool inside Microsoft 365 Copilot that lets you quickly create custom, knowledge-grounded agents without coding. It's designed for speed and simplicity—ideal for scenarios where you need a persona-based agent that reflects a specific voice or expertise.

Step by step process with Agent Builder

1) Get into Agent Builder

- Open Copilot Chat and choose Create agent in the right rail to launch the lightweight Agent Builder experience. It's purpose-built for declarative, knowledge-grounded agents—no coding required.

2) Choose your authoring path: *Describe* or *Configure*

- Describe tab → Write natural-language instructions (what the agent should do, how it should sound). Agent Builder turns this into the initial instruction set.

- Configure tab → Manually craft the agent, including instructions and knowledge sources, if you want precise control from the start.

3) Draft clear instructions (the “voice” DNA)

In Agent Builder, instructions are a structured “mega-prompt” that define purpose, tone, and user interaction. Use concise, specific guidance, the interface is optimized for packaging this context for repeated use.

Tips for instructions

- **Purpose:** “Create leader-authored drafts for posts, emails, and remarks.”
- **Tone:** “Authoritative yet approachable; first-person when appropriate.”
- **Guardrails:** “Cite sources; avoid speculative claims.”
- **Interaction:** “Ask 2–3 clarifying questions if the request is ambiguous.”
(Agent Builder supports up to ~8K characters; more detail improves reliability.)

4) Add knowledge sources (ground the voice)

- Upload files (speeches, talking points, blog posts) directly in Agent Builder; drag-and-drop is supported.
- Connect SharePoint sites, libraries, or documents that capture the leader’s authentic voice; the agent respects end-user permissions on those sources.
- Optionally add select, trusted web sources if your comms policy allows it.

5) Try it out in chat (fast validation)

Use Copilot Chat to test prompts your team runs:

- “Draft a 120–150 word LinkedIn post on our sustainability milestone; first-person, warm tone, cite two internal sources.”
- “Create a 3-bullet talking points card for next week’s town hall; avoid acronyms; include one statistic.”

Because Agent Builder sits inside Copilot Chat, you can iterate rapidly without leaving your comms workflow.

6) Refine with the instruction toolkit (optional but powerful)

If drafts feel “off,” use guidance on writing effective declarative-agent instructions to tighten purpose, tone, and restrictions; iterate until outputs match your leader’s style.

7) Share the agent (lightweight distribution)

- Agents created in Agent Builder can be shared to specific users/groups or broadly within your org; they can’t be published to the org app catalog from Agent Builder. Use sharing controls aligned to your comms review model.
- When sharing to a security group, you can automatically share the underlying SharePoint knowledge sources with that group, keeping access aligned.

8) Know the boundaries (so communications stay compliant)

- Agent Builder is optimized for knowledge-only declarative agents (instructions + knowledge). For automation, connectors, and advanced workflows, the “open in full version” path to Copilot Studio is available to extend later.
- Follow internal guidance for privacy and responsible AI when grounding with SharePoint pages/lists; sensitivity labels might not surface in all agent responses—owner remains accountable.

Copilot Studio Overview

Copilot Studio is Microsoft's low-code platform for building custom AI agents within Microsoft 365. It lets users design conversational flows, connect enterprise data, and automate tasks with minimal coding. The platform supports persona-based agents, allowing integration of tone, style, and organizational context into agent instructions.

Step-by-Step Setup for Executive Voice Agent

Prep work: You may need to work with your IT Department to get this sorted before you can create your agent!

- **Licensing & Access:** Ensure you have a Copilot Studio Developer License and M365 Copilot License. Assign the *Environment Maker* role in your Power Platform environment. [\[Get access...soft Learn | Learn.Microsoft.com\]](#)
- **Data Loss Prevention (DLP):** Define policies before connecting external data sources to maintain compliance.

2. Define Agent Instructions

- Use **Role-Goal-Backstory**: Specify that the agent should use existing messaging from comms guidance and writing guidelines.
 - *Role*: “Executive Thought Leadership Agent”
 - *Goal*: Draft visionary, authentic content for internal & external audiences.
 - *Backstory*: Executive known for innovation and empathy.
- Write clear, actionable instructions:
 - Provide specific details on tone, style, audience, cultural nuances, etc. for each writing format.
 - Include fallback responses for unknown queries.
 - Who is your leader? What's their communications style?
 - Does their communications style differ per channel (i.e. voice vs written)?
 - What are some details about your organization? What is your org's employee comms voice?
 - Which channels resonate best with your audience?
 - Reference knowledge sources explicitly (e.g., “Use uploaded speeches and blogs for grounding”). [\[learn.microsoft.com\]](#)

3. Add Knowledge Sources

- **Agent knowledge:** Content sources for your agent to pull from. These sources will be the foundation of your agent's 'knowledge' it's important to ensure they're up-to-date and well maintained.
 - **Create a folder** for your leader's communications and another folder for your organization's employee communications.
 - In each, link to transcripts, LinkedIn posts, emails, talking points, newsletters and other content that captures your leader or org's voice. **Link to both folders in the Knowledge section.**
 - To make sure your content aligns with communications guidance, link to a folder with that information as a **knowledge source**.
 - **Add links to SharePoint sites or documents** with other resources and guidance for consistency across communications, marketing, and brand.
- Optionally add trusted public sites for industry insights.

5. Test & Validate

- Use the **Test Panel** in Copilot Studio to simulate conversations.
- Validate tone and style against your checklist.
- Run realistic scenarios (e.g., "Draft LinkedIn post on sustainability").

6. Publish & Monitor

- Deploy to Microsoft Teams or M365 Copilot.
- Use built-in analytics for performance tracking and continuous improvement.

Going further – adding actions and workflows

Configure Actions & Tools, enable voice features

- Use Power Automate to streamline publishing approved drafts to Teams or SharePoint, freeing up time for strategic communications work. Agents can also automate routine communications, ensuring consistent quality even when supporting multiple executives or campaigns.
- Add connectors for Outlook (email drafts), Teams (social posts), and external APIs if needed.

Enable Voice Features (Optional)

- Use **Voice Agent Template** in Copilot Studio for speech-enabled interactions.
- Configure SSML (Speech Synthesis Markup Language) for tone, pitch, and speed.
- Integrate Azure TTS or ElevenLabs for authentic voice output. [\[Set up IVR...soft Learn | Learn.Microsoft.com\]](#), [\[learn.microsoft.com\]](#)

Licensing Overview

- **Copilot Studio License** – Required for creating and managing agents.
<https://learn.microsoft.com/microsoft-copilot-studio/billing-licensing>

- **Copilot Credits** – Currency for agent actions and generative answers. Available as prepaid packs or pay-as-you-go. <https://msadvance.microsoft.com/copilot-studio/pricing-licensing-plans>
- **Microsoft 365 Copilot License** – Needed to integrate agents into M365 experiences like Outlook and Teams.
- **Environment Roles** – Assign *Environment Maker* in Power Platform and configure DLP policies for compliance.
- **Trial Option** – Create test agents but cannot publish.

Example Prompts & Best Practices

Start simple with one channel, implement feedback loops, ensure ethical guardrails, and continuously update with new content.

Behavior instruction: Writing on behalf of [Executive Name], [Title]. Mission: Draft compelling, high-quality executive content for external audiences. Reflect executive's unique voice: bold, thoughtful, grounded in industry insight. Use first-person perspective with authoritative, conversational tone.

- Draft LinkedIn post announcing sustainability initiative.
- Create keynote introduction for industry conference emphasizing innovation and empathy.
- Write an op-ed on leadership trends for upcoming fiscal year.
- Write an org-wide email about a leadership transition.

A Few Short Examples: Include sample prompts in instructions.

- What are your most frequent writing tasks for leader communications?
 - Writing a Viva Engage post
 - *"Draft a short, engaging Viva Engage post announcing our new initiative. Keep the tone inspiring and aligned with our executive voice—focus on vision and impact."*
 - *"Write a Viva Engage update introducing our upcoming town hall. Include a call to action for employees to submit questions."*
 - Writing an org-wide email
 - *"Draft an email to all employees summarizing key priorities for the next quarter. Use a confident, executive tone and include a closing message of encouragement."*
 - *"Write an email to the organization about upcoming policy changes. Ensure the tone is transparent, empathetic, and emphasizes support resources."*
 - Edit talking points
 - *"Edit these talking points for clarity and flow. Ensure they reflect our strategic priorities and resonate with a broad audience."*
 - *"Polish these talking points for a fireside chat. Keep the tone conversational yet authoritative and add a strong opening statement."*
- What are your most frequent writing tasks for employee communications?

- Writing a newsletter
 - ***Draft a monthly executive newsletter*** summarizing key achievements and priorities. Keep tone visionary and appreciative, highlight impact on employees and customers.”
 - ***Create a newsletter section introducing a new initiative*** with clear benefits and a call to action for engagement.”
- Writing a blog post
 - ***Draft a blog post announcing a major milestone*** in the company journey. Use an inspiring tone, emphasize leadership perspective and outlook.”
 - ***Create a blog post sharing executive insights*** on industry trends. Keep tone authoritative yet approachable, include actionable takeaways for employees.”
- Building and maintaining effective knowledge sources
 - Understand that an executive may have a different voice in written and spoken communications, include both options to get a well-rounded knowledge base
 - Establish a uniform or similar naming convention for files and folders.
 - **Focus on authoritative sources:** official documents and validated materials rather than informal or draft versions
 - **Ensure clarity and Structure:** Use headings, lists and summaries and avoid complex layouts, tracked changes or multi-column formats.
 - **Regularly audit content:** Review and update knowledge sources every 6 months (or more frequently if needed)
 - **Use AI to check freshness:** Use AI-tools to flag outdated content and suggest updates
 - **Security:** Classify and apply sensitivity labels to maintain compliance and improve discovery. Define policies before connecting to external sources
 - **Use built-in security access features:** Limit access to sensitive knowledge to approved users

Going further:

Design your dream agent

- You are an agent-building wizard, here to help me conjure an agent to support my work in communications. Let's brainstorm areas where an agent could help me in my work. Ask me three questions about the repeatable communications work I do so we can decide where to focus. Then, help me write strong instructions for my agent based on these [guidelines](#).

Appendix:

Related articles

- [Elevating internal communications at Microsoft with AI](#) – How Microsoft's internal communications team uses AI to streamline daily tasks and foster collaboration
- [How we're using Microsoft Designer to revolutionize our visual content](#) – How internal comms is using AI for campaign visuals

On-demand webinars

- [AI, agents and how communicators can lead the way](#) with Jon Bates
- [Becoming a Frontier communicator](#) with Lindsay Powers Tiernan