2toLEAD

Nonprofit AI Agent Playbook

Streamline Operations with Agents

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E-BOOK

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Introduction to Copilot Agents

What are Copilot Agents?

A Copilot Agent is an AI-powered digital assistant designed to help users' complete tasks, solve problems, and generate content through natural language interaction. Unlike traditional chat agents, Copilot Agents are conversational, goal-oriented, and context-aware, making them highly effective for a wide range of applications.

They leverage advanced language models to understand user intent, maintain coherent dialogue, and perform complex, multi-step tasks. These agents are often multimodal, capable of working with text, images, code, and more. These agents are typically integrated with tools, APIs, or internal systems to extend their functionality beyond simple conversation.

Real-world examples include Microsoft 365 Copilot, which assists with productivity tasks in Word, Excel, and Outlook; GitHub Copilot, which helps developers write and understand code; and custom-built Copilot Agents tailored for specific domains like customer support, education, or healthcare.

Building your own Copilot Agent allows you to tailor its capabilities to your unique workflows, integrate it with proprietary tools or data, and enhance productivity, creativity, and decision-making within your environment.

How Do Agents Differ from Traditional Chat Agents?

- **Smarter:** Uses advanced AI models (like GPT-4 or later) for deeper understanding and reasoning.
- **More Capable:** Can handle complex workflows, multi-step tasks, and dynamic user needs.
- **Context-Aware:** Maintains memory or session context to provide coherent, personalized assistance.

Why Build Your Own Agents?

- Tailor the agent to your unique workflows or business needs.
- Integrate with proprietary tools or data.
- Enhance productivity, creativity, and decision-making in your environment.

Privacy & Security

Copilot doesn't learn from individual user interactions in the way humans do. Instead, it relies on a vast amount of pre-existing data and continuous updates from its developers to improve its responses. This data includes books, articles, websites, and other text sources from trusted sources, ensuring the information provided is accurate and relevant.

While Copilot can remember the context of the current conversation to maintain coherence, it doesn't store personal data or learn from specific user interactions, ensuring your privacy and security. Additionally, users have the option to delete their Microsoft Copilot interaction history, which includes their prompts and the responses Copilot returns.

Integration with Organizational Data

Microsoft 365 Copilot's ability to leverage organizational data is a key differentiator. It integrates with various data sources within Microsoft 365, such as emails, Teams messages, SharePoint documents, and more. This integration allows Copilot to provide responses that are not only based on the user's prompt but also grounded in the data the user has access to within the organization. This ensures that the responses are relevant and tailored to the user's specific context.

For example, Copilot can:

- Summarize emails and documents from SharePoint and OneDrive.
- Retrieve information from Teams chats and meetings.
- Access calendar events to provide scheduling assistance.
- Utilize data from Dynamics 365 and other enterprise systems through Microsoft Graph connectors.

Enhancing Copilot with External Data

Copilot can also be extended to integrate with external data sources using Copilot connectors. These connectors allow organizations to bring in data from various systems, enhancing the AI-driven experience. For instance, you can use Microsoft Graph connectors to integrate data from non-Microsoft sources, providing a more comprehensive view and enabling more informed decision-making.

AI Use Cases for Nonprofit Organizations

Delivering Social Impact at Scale

Nonprofits often have limited resources, so AI agents can be a force multiplier, taking on tasks in donor engagement, grant writing, volunteer management, and reporting. The focus is on agents that help streamline operations and amplify outreach without requiring significant technical overhead.

This playbook outlines several AI agents tailored to the nonprofit sector, with details on how to build them using Microsoft 365 and the Power Platform.

Opportunities to Impact Nonprofit Operations

Copilot Agents can help nonprofits do more with less by automating routine tasks, analyzing data for smarter decisions, and scaling services to reach more people. They can support fundraising, manage volunteers, and provide 24/7 support to communities in need.

By turning data into insights and making services more accessible, Copilot Agents empower nonprofits to focus on what matters most, their mission. This means greater impact, less burnout, and more time for human connection.

Fundraising Optimization: Predict donor behavior and personalize appeals. Automate thank-you notes and impact updates.

Volunteer Management: Match volunteers to tasks based on skills and availability. Automate onboarding and training with conversational agents.

Grant Writing Assistance: Draft compelling proposals using AI-generated templates and data insights. Summarize impact metrics and success stories.

Program Delivery: Use AI tutors, mental health agents, or legal aid assistants to deliver services directly. Translate educational or health content into multiple languages.

Community Listening: Analyze social media, surveys, and feedback to understand community needs. Identify emerging issues and respond proactively.

Partnership Development: Research potential partners and draft outreach messages. Track and manage stakeholder relationships.

Nonprofit Roles Using AI

Fundraising Manager

Description: Leads donor engagement, fundraising campaigns, and stewardship strategies.

AI-Enhanced Productivity:

- Predicts donor giving patterns and suggests personalized outreach.
- Automates thank-you emails and impact updates.
- Generates real-time fundraising dashboards and campaign performance reports.

Program Director

Description: Oversees the design, delivery, and evaluation of nonprofit programs.

AI-Enhanced Productivity:

- Analyzes program data to identify trends and improve outcomes.
- Simulates program impact scenarios for strategic planning.
- Automates reporting for stakeholders and funders.

Volunteer Coordinator

Description: Manages volunteer recruitment, scheduling, and engagement.

AI-Enhanced Productivity:

- Matches volunteers to roles based on skills and availability.
- Automates onboarding, training, and reminders.
- Tracks volunteer hours and generate engagement reports.

Communications Officer

Description: Crafts and manages the organization's messaging across platforms.

AI-Enhanced Productivity:

- Drafts newsletters, blog posts, and social media content.
- Tailors messaging for different audiences using sentiment and engagement analysis.
- Schedules and optimizes content delivery for maximum reach.

Grant Writer

Description: Develops compelling proposals and reports to secure funding.

AI-Enhanced Productivity:

- Drafts grant proposals using templates and past performance data.
- Summarizes impact metrics and success stories.
- Tracks deadlines and automates submission checklists.

Client Services Specialist

Description: Provides direct support and resources to clients or beneficiaries.

AI-Enhanced Productivity:

- Uses chat agents to offer 24/7 support and triage requests.
- Translates information into multiple languages for accessibility.
- Recommends resources based on client needs and history.

Agent: Donor Inquiry Agent

Agent Name: Donor Help Agent

Agent Description

A chat agent on the nonprofit's website (or social media channel) that answers common questions from donors and potential donors. It can provide information about the organization's mission, how to donate, how donations are used, upcoming fundraising events, and address issues like tax receipts or donation matching.

Essentially, it's an always-available front-line for donor relations, improving engagement and possibly conversion rates for website visitors thinking about donating.

Tools Used

Copilot Studio For building the chat interface and dialog flows.

SharePoint: To store Q&A content or donor information.

Q&A knowledge base: For a source of FAQs to handle varied donor questions similarly to earlier FAQ agent.

Power Automate: For any integration needed like logging a question to a CRM or handing off to human.

Teams/Outlook: If an agent picks up escalations, or for internal testing.

Key Actions & Data Flow

User Engagement

- A visitor lands on the nonprofit's website and starts a conversation with the Donor Help Agent. Example: "What does your charity do?"

Instant Information Delivery

- The agent replies with the organization's mission statement or a brief overview.
- If asked "How can I donate?", it provides:
    - A direct link to the online donation page.
    - Instructions for donating by mail, phone, or in person.

Answering Common Questions

- "Is my donation tax-deductible?" → The agent responds based on the nonprofit's status (e.g., "Yes, we're a registered 501(c)(3). You'll receive a tax receipt.")
- "Can I get a tour of your facilities?" → The agent can:
    - Share contact info for scheduling.
    - Offer a booking link if available.

Handling Complex or Personalized Requests

- For questions that require human follow-up, the agent collects contact details:
    - "Let me have a staff member reach out to you. May I have your email?"
- It then notifies the appropriate team member via email or CRM integration.

Sharing Impact Stories

- When asked "What impact have you made?", the agent can:
  - Share key stats or success stories.
  - Link to the latest annual report or blog posts.

Benefits

- Reduces repetitive inquiries for staff.
- Provides donors with fast, friendly, and accurate responses.
- Builds trust and encourages deeper engagement.

How to Build the Agent

Gather FAQs and Content

- Start by talking to your fundraising team to identify the most common donor questions.
- Typical topics include:
  - Mission and impact
  - How to donate
  - Use of funds
  - Volunteering opportunities
  - Events
  - Tax receipts
  - Corporate matching
- Write clear, friendly answers for each. You can often reuse content from your existing "About Us" or FAQ pages.

Setup in Copilot Studio

- Add Q&A pairs manually or use the Custom Question and Answer feature to upload a prepared FAQ document.
- Create guided topics for key actions like "How to donate." These can include:
  - A short answer
  - An Adaptive Card with a "Donate Now" button linking to your donation page
  - Attachments or links for convenience

Handle Complex Questions or Human Handoff

- If the agent can't answer a question (after one or two tries), or if the user says, "I want to talk to someone," trigger a handoff.
- Options:
  - If using Omnichannel for Customer Service, use PVA's built-in live agent handoff.
  - If not, use Power Automate to:
    - Collect the user's name, email, and question
    - Send an email to a shared inbox (e.g., info@nonprofit.org)
    - Example: "Donor Inquiry: [question]. Contact: [email]."
  - Alternatively, store the info in a SharePoint list or CRM for follow-up.

Deploy the Agent

- Embed the agent on your public website using the iframe code provided by Copilot Studio.
- Customize the agent's appearance to match your branding (colors, logo, tone).
- Suggested greeting:
  - "Hi, I'm the ABC Charity Assistant. I can answer questions about our work or help you donate."
  - Optional: Add the agent to your Facebook page or Teams (for internal use), but the website and mobile experience are the most important for donors.

Test and Refine

- Ask staff or volunteers to test the agent with real questions.
- Make sure it can handle emotional or trust-based queries like:
  - "Why should I trust you?"
  - Prepare answers that show transparency and credibility (e.g., Charity Navigator ratings, program spending percentages).
- Add these "tough questions" to the knowledge base proactively.

Agent: Grant Writing Assistant

Agent Name: Proposal Copilot

Agent Description

The Grant Writing Assistant is designed to support nonprofit staff in drafting compelling grant proposals and reports, two critical but often time-consuming tasks. This agent streamlines that process by generating draft narrative sections such as the executive summaries, needs statements, project descriptions, and more.

Staff simply provide key inputs—like the project name, goals, budget figures, and timeline—and the assistant produces a structured, professional draft that can be easily tailored to specific funders. It also ensures that common grant questions are addressed clearly and consistently.

For grant reporting, the agent can take outcome data (such as the number of people served or success metrics) and generate a narrative that highlights impact and aligns with funder expectations.

Tools Used

Microsoft Word with Copilot: For inline suggestions, but we can also do via Power Automate.

Copilot Studio: Used for the chat interface for queries.

Power Automate: Used to gather inputs and generate documentation.

SharePoint or Forms: To input project details in a structured way or to store templates.

Teams/Outlook: For the user interface if they chat with it or simply using Word as the interface.

Teams Agent: If interactive, but perhaps a form-driven approach is easier for structured input.

Key Actions & Data Flow

The process begins when a nonprofit staff member provides the agent with key details about the grant opportunity. This can be done through a simple form that collects inputs such as the grantor's name, project title, goals, timeline, target population, amount requested, and budget breakdown. Alternatively, the user can paste an existing project brief or concept note.

Once the information is submitted, the agent generates draft sections of the grant proposal. For example:

- A **Needs Statement** based on the community context and challenges described
- A **Project Plan** using the goals, activities, and timeline
- A **Budget Justification** that explains how the requested funds will be used

The output can be formatted into a clean, professional Word document, ready for review and customization.

The agent can also adjust the tone of the writing, some funders prefer a formal, data-driven style, while others may welcome a more narrative or community-centered voice. The user can specify this preference up front.

After the initial draft is generated, the user can interact with the agent to refine the content. For example, they might ask it to shorten a section, emphasize a particular outcome, or clarify a point. If integrated with tools like Microsoft Word's Copilot, users could even highlight text and prompt the assistant directly (e.g., "Rewrite this as a needs statement").

In this version of the agent, we simulate that experience by gathering all necessary data up front and generating a complete draft in one go, saving time and giving staff a strong starting point for high-quality grant writing.

How to Build the Agent

Define the Template

Start by identifying the standard sections commonly required in grant proposals. These often include:

- Executive Summary
- Organization Background
- Statement of Need
- Project Description (including goals and methods)
- Evaluation Plan
- Budget Justification
- Sustainability Plan (how the project will continue after funding)

Create a Word document template with section headings and optional placeholders. This will serve as the structure for the final output.

Collect Input from Staff

Use a Microsoft Form, Power Apps form, or even an Adaptive Card in Teams to gather key project details. Suggested fields include:

- Organization mission (can be pre-filled if stored)
- Problem statement or general area of need
- Project summary (a few lines)
- Goals (e.g., list 2–3)
- Activities (bullet points)
- Target population description
- Budget breakdown or total amount requested
- Timeline and expected outcomes

Encourage staff to provide as much detail as possible, more context leads to better AI-generated content. Consider using separate fields for each section to guide input and improve prompt quality.

Generate Proposal Sections with Power Automate

Once the form is submitted, use Power Automate to process the responses and generate content. For each section, craft a tailored prompt to send to the AI model. For example:

"You are writing a grant proposal for a nonprofit. Write a compelling Needs Statement based on the following: [insert problem description and target population]. Emphasize why this issue is urgent and relevant to the grantor."

Repeat this for each section (e.g., Project Description, Budget Justification), using the relevant inputs. While it's possible to generate the entire proposal in one long prompt, breaking it into sections improves reliability, control, and quality.

Assemble the Document

Use the Word Online (Business) connector in Power Automate to populate a pre-designed Word template. There are a few options:

- Use content controls (e.g., <<NeedsStatement>>) in the Word doc and map each AI-generated section to the corresponding field.
- Alternatively, combine all sections into a single HTML string and create a .docx file using the "Create file" action (more complex, but flexible).
- The content control method is recommended for ease and formatting consistency.

Deliver the Output

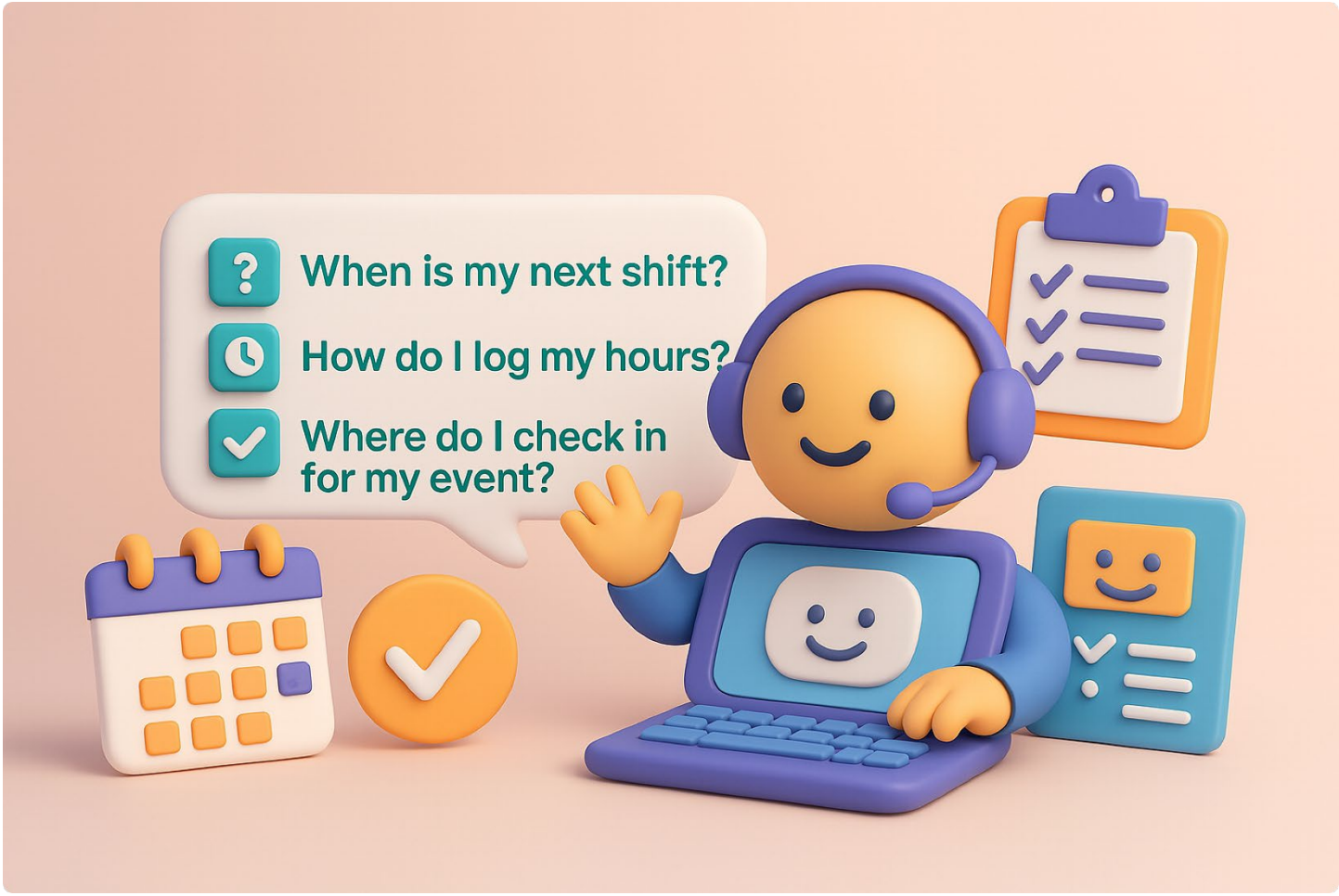
Once the document is assembled:

- Save it to SharePoint or OneDrive and share a link with the user.
- Optionally, email the file directly or display a preview in Teams or chat.
- Ensure the user can download and edit the document as needed.

Enable Iteration (Optional)

If the user wants to revise the draft (e.g., "make this shorter" or "change the tone"), you can allow follow-up prompts to regenerate specific sections. While full interactive editing (like Word Copilot) may be out of scope for now, you can mention that users are encouraged to refine the draft using their expertise—the agent's role is to provide a strong first draft.

Agent: Volunteer Coordinator



Agent Name: Volunteer Assistant

Agent Description

This agent helps nonprofits manage and engage their volunteers more efficiently. It supports volunteers and coordinators by streamlining communication, scheduling, and onboarding.

The assistant can answer common volunteer questions such as:

- “When is my next shift?”
- “How do I log my hours?”
- “Where do I check in for my event?”

Volunteers can interact with the agent to sign up for shifts, update their availability, or receive reminders. The assistant can automatically update a shared schedule, send confirmation messages, and even follow up with reminders before events.

For coordinators, the agent reduces manual coordination by:

- Sending broadcast messages or updates to volunteer groups
- Distributing surveys or availability check-ins using Adaptive Cards or email
- Collecting responses and organizing them for easy review

By automating routine tasks and providing instant answers, the Volunteer Assistant saves staff time and helps volunteers feel more supported and connected. It's a practical tool for improving the volunteer experience and ensuring smooth operations behind the scenes.

Tools Used

Copilot Studio For conversation flows, simple dialogues, questions and answers.

Teams (or website): For the volunteer chat interface to work with the agent.

SharePoint: This is the database for volunteer info and schedules.

Power Automate: Used for scheduling logic and sending notifications.

Adaptive Cards: Used to select shifts. If using the new Microsoft Volunteer Management (if any product exists) but likely use generic lists.

Bookings or Calendar: Used to manage event sign-ups as appointments.

Key Actions & Data Flow

Answering Volunteer Questions

Volunteers can ask the assistant common questions such as:

- "How do I get a volunteer certificate?"
- "Where do I park for the event?"
- "How do I log my hours?"

The agent responds using a volunteer-specific knowledge base, pulling from FAQs or internal documentation. This reduces repetitive inquiries to staff and ensures volunteers get quick, accurate answers.

Shift Sign-Up and Scheduling

Volunteers can sign up for events directly through the agent. For example:

- **Volunteer:** "I want to sign up for Saturday's event."
- **Agent:** "Great! We have two shifts available: Morning (9–12) and Afternoon (1–4). Which would you prefer?"

Once the volunteer selects a shift, the agent records their choice in a SharePoint list or books them via Microsoft Bookings (if each shift is set up as a service).

Volunteer coordinators can also ask the agent for scheduling info, such as:

- "Who's signed up for Saturday?"

The agent retrieves and displays the list from the scheduling system.

Reminders and Notifications

The assistant can send automated reminders to volunteers before their shifts. For example:

- A Power Automate flow triggers a reminder email or Teams message 24 hours before an event.
- The agent can also proactively message volunteers:

  "Reminder: You have a shift tomorrow at 9 AM at Community Center A."

Coordinators can also use the agent to broadcast messages or send surveys (e.g., to check availability for an upcoming event) using Adaptive Cards or email.

Logging Volunteer Hours

Volunteers can log their hours by chatting with the agent:

- "Log 3 hours for the cleanup event on May 1."

The agent records the entry in a volunteer hours log (e.g., SharePoint list or Excel file). If needed, it can also open a form for more detailed submissions or confirm entries with the coordinator.

How to Build the Agent

Set Up the Volunteer Data Structure

Use SharePoint lists to manage core volunteer data:

- Volunteer Roster: Name, Email, Skills, Availability, etc.
- Events/Opportunities: Event name, date, location, shift times, number of volunteers needed, staff lead, etc.
- Sign-Ups: Links volunteers to specific events and shifts (e.g., Event Name, Shift, Volunteer Name).
- Logged Hours (optional): Volunteer name, event, date, number of hours.

If using Microsoft Teams, you can also create a dedicated volunteer channel, but most data handling is easier through structured lists.

Create a Volunteer FAQ

Compile a list of frequently asked questions from volunteers, like the donor agent. Topics may include:

- How to get a volunteer certificate
- Parking and arrival instructions
- Dress code or what to bring
- Mission-related questions

Use Copilot Studio Q&A features to store and respond to these queries automatically.

Build the Sign-Up Dialogue

In PVA, create a topic triggered by phrases like “sign up,” “volunteer for [event],” or “I want to help.”

- If the event name isn’t specified, the agent can call a Power Automate flow to fetch upcoming events from the SharePoint list and present them as options (via text or Adaptive Cards).
- Once the volunteer selects an event, the agent checks for available shifts and prompts them to choose one.
- After selection, the agent confirms availability (if there’s a cap on volunteers) and records the sign-up in the SharePoint list.

The agent then confirms:

- “Great! You’re signed up for the Saturday Morning shift. We’ll send you a reminder the day before.”

For identity, if the volunteer is logged in with a Microsoft 365 account, PVA can detect their name/email. If not, the agent can ask for their email and match it to the roster—or create a new entry if they're a first-time volunteer.

Set Up Reminders and Notifications

Use Power Automate to schedule daily flows that:

- Check for events happening the next day
- Pull the list of signed-up volunteers
- Send reminder emails (or Teams messages) with event details

Example message:

"Reminder: You're scheduled for the Community Cleanup on Saturday at 9 AM. Location: Central Park. Contact Jane Doe if you have questions. Thank you for volunteering!"

The agent can also be configured to send messages on command from a coordinator, but scheduled flows typically cover most needs.

Enable Hour Logging (Optional)

Volunteers or coordinators can log hours via chat:

- "Log 2 hours for John for the Food Drive event."

This creates an entry in the Hours list. Alternatively, the agent can provide a link to a form where volunteers can submit their hours manually. For simplicity, you may choose to implement this as a form-based process first.

Answer Contextual Volunteer Inquiries

For more specific questions like:

- "Who is my team lead for Saturday?"

If the event record includes a staff lead, the agent can retrieve and share that information.

If the event was mentioned earlier in the conversation, the agent can use that context; otherwise, it may ask the user to specify the event name.

Agent: Impact Report Generator

Agent Name: Impact Analyst Assistant

Agent Description

This agent helps nonprofits quickly generate compelling impact reports for donors, board members, or stakeholders. Instead of starting from scratch, staff can input key metrics, such as the number of people served, program outcomes, success stories, and relevant statistics. The assistant will transform that information into a well-written narrative.

The agent can draft sections for:

- Program highlights
- Quantitative outcomes (e.g., “We served 1,200 families this year”)
- Qualitative insights (e.g., personal stories or testimonials)
- Summary statements for donor updates or annual reports

It can also suggest where to include visual elements like charts or graphs to enhance the report's clarity and appeal. While the agent may not generate visuals directly, it can recommend what to visualize (e.g., "Consider a bar chart comparing year-over-year growth") and even structure the data for easy use in Excel or Power BI.

By automating the first draft, the Impact Analysis Assistant saves staff time, ensures consistent messaging, and helps nonprofits communicate their value and effectiveness in a clear, donor-friendly way.

Tools Used

Copilot Studio For conversation flows, simple dialogues, questions and answers.

Word/PowerPoint: Used as the data sources depending on the format; Word doc for report text or PowerPoint slides summaries.

SharePoint: This is the database to store templates or previous report data.

Power Automate: Used to gather inputs and call the agent.

Power BI: Optional, can be used if wanting to include charts, maybe optional step to embed image of chart if one exists.

Outlook: Used to share email summaries.

Key Actions & Data Flow

Input Collection

A staff member begins by entering the reporting period (e.g., "Q2 2025") and key program highlights. These may include:

- Quantitative metrics (e.g., "300 people served," "5 wells built")
- Qualitative insights (e.g., expansion into new regions, notable achievements)
- Anecdotes or testimonials from beneficiaries
- Outcome data (e.g., "40% reduction in waterborne illnesses")

Narrative Generation

The agent uses this input to generate a polished, 1–2-page narrative summary. For example:

"In Q2 2025, we brought clean water to 300 individuals across two new villages by constructing five wells. This expansion into the XYZ region marked a major milestone in our mission. According to local clinic data, waterborne illnesses dropped by 40% during this period. We also launched a new community training program to ensure long-term sustainability…"

The narrative can include:

- Program summaries
- Outcome highlights
- Donor acknowledgments
- Volunteer contributions
- Embedded stories or quotes (if provided)

Multi-Program Support

If data is provided for multiple programs, the agent can structure the report by program area, ensuring each initiative is clearly represented.

Visual Suggestions

While the agent may not generate charts directly, it can suggest visual elements to include (e.g., "Consider a bar chart showing year-over-year growth in people served").

If integrated with Excel or Power BI, it could potentially assist in preparing data for visualization.

Output

The final report can be exported as a formatted Word document or email-ready summary, ready for use in donor updates, board presentations, or annual reports.

How to Build the Agent

Design the Input Interface

Create a simple and structured way for staff to submit report data. Options include:

- A Microsoft Form or Power Apps form
- An Excel template with clearly labeled fields

Recommended fields:

- Reporting period (e.g., "Q2 2025")
- Key outputs (e.g., number of people served, services delivered)
- Outcomes (e.g., impact metrics, changes observed)
- Anecdotes or quotes (e.g., beneficiary stories, staff reflections)
- Program areas (if reporting on multiple initiatives)

For best results, separate inputs by category (outputs, outcomes, stories) rather than relying on free text. The more structured the input, the more accurate and compelling the generated narrative will be.

Build the Prompt and Flow

Use Power Automate to process the form or Excel input and construct a prompt for the AI model. A sample prompt might look like:

"You are a communications specialist drafting an impact report for a nonprofit. The reporting period is [Q2 2025]. The organization focuses on [mission]. During this time:

- [List of outputs]
- [List of outcomes]
- Include this anecdote: '[story or quote]'.
- Write a 3–4 paragraph summary in an appreciative, donor-friendly tone. Highlight achievements, include key statistics, and end with a thank-you to supporters."

Providing metrics in bullet form helps the model integrate them naturally into the narrative. The anecdote adds a human touch and emotional resonance.

Generate and Refine the Output

Call the AI model with the constructed prompt.

The output will typically be a well-structured narrative that includes:

- A summary of achievements
- Quantitative and qualitative impact
- A personal story or quote
- A closing message of gratitude

You may optionally post-process the output to ensure all key data points are included or to apply light formatting.

Create the Final Report

Deliver the output in a format that's easy to review and edit:

- **Word document** (recommended for editing and formatting)
- **Email body** (if sending directly to donors or board members)
- **PDF** (for polished, shareable reports)

You can use the Word Online (Business) connector in Power Automate to populate a basic template with section headings like:

- Introduction
- Impact in Numbers
- Stories from the Field
- Closing & Acknowledgments

More advanced formatting (e.g., branded templates) can be added later, but starting with clean, editable text is most practical.

Visual Enhancements (Optional)

If numerical data is included, the assistant can suggest visual elements (e.g., "Consider a bar chart comparing quarterly growth"). While the agent won't generate charts directly, you can:

- Use Excel to create simple visuals
- Integrate with Power BI for more advanced dashboards

This step can be manual or semi-automated depending on your tools and needs.

Iteration and Flexibility

Users may want to:

- Regenerate the summary with a different tone or emphasis
- Manually tweak the language
- Run the assistant multiple times with updated data

This agent is designed as a first-draft generator, not a fully interactive editor. However, future enhancements could include Word integration or a chat agent interface for real-time editing.