WILL YOUR NEXT HIRE BE A ROBOT?

Quick Start Guide for AI Tools

FOREWORD:

At Systems Support we believe that technology should be a tool for growth, not an obstacle to overcome. Businesses today face a rapidly evolving landscape where automation, AI, and cloud computing are reshaping the way we work. But keeping up with these changes can feel overwhelming.

That's why we've put together this guide—to help you navigate the latest advancements, cut through the noise, and make smart, strategic decisions about the future of your business. Whether you're looking to streamline operations, enhance security, or simply make your day-to-day a little easier, our goal is to provide clear, practical insights that set you up for success.

Technology is changing—let's make sure it's changing for you.

AI Agents are Just Virtual Assistants

IMAGINE FOR A MOMENT...

You have a remote employee that when you ping, always responds.

This remote employee is trained on information from the web and any documents you provide to them in specific containers.

You can even coach this employee, guiding what the correct answers should be!

That remote employee could be an AI Agent!

AI Agents can take over internal processes such as creating marketing content, answering HR questions, and finding documentation answers.

Once the internal agents are well set up, the agents can be setup for customer-facing applications.

Before We Dive Too Deep

AI agents are popping up everywhere, promising to handle your emails, schedule meetings, and maybe even make your coffee (still waiting on that one, though). But before you hand over the keys to your digital kingdom, let's break down the pros and cons of letting AI into your daily workflow.

THE GOOD STUFF

✅ **No More Boring Tasks** – AI can handle repetitive admin work like data entry, appointment scheduling, and inbox triage, so you can focus on actual work (or at least pretend to).

✅ **Works 24/7 (No Complaints)** – Unlike Steve from accounting, AI doesn't take coffee breaks, ask for PTO, or mysteriously disappear at 4:45 PM every Friday.

✅ **Faster Decision-Making** – AI can analyze data and summarize reports in seconds, meaning you don't have to stare at spreadsheets until your soul leaves your body.

✅ **Great for Customer Support** – AI chatbots can answer FAQs, route inquiries, and keep customers happy without you having to type the same response 17 times a day.

THE "HOLD ON A SECOND" STUFF

❌ **Not Always Right (But Very Confident)** – AI loves making bold claims, even when it's totally wrong. If your AI starts calling customers "Dear [Insert Name Here]," you might want to double-check its work.

❌ **Loves to Overshare** – AI can generate reports, but sometimes it gives way too much irrelevant info. Do you really need a 10-page breakdown on why someone rescheduled their meeting? Probably not.

❌ **Security & Privacy Risks** – If you're letting AI handle sensitive data, make sure it's secure. Otherwise, your "helpful assistant" might turn into an accidental data leak machine.

❌ **It's Still Learning...** – AI can get better over time, but it's not perfect out of the box. You'll need to train it, tweak its responses, and occasionally tell it to chill out with the passive-aggressive email drafts.

FINAL VERDICT?

AI assistants can be game-changers, but they're not quite ready to replace a real human (yet). Use them for automation, but keep an eye on them—like a really enthusiastic intern who means well but still needs supervision.

Thinking about bringing AI into your workflow? Let's chat about how to do it without accidentally creating a digital Frankenstein, book a discovery call at systemsupport.com/aiguide

Learning how to prompt effectively is key to getting the most from AI agents.

Use the GCES Framework: Goal, Context, Expectations, Source.

An AI employee is still an employee; it takes oversight and management.

Trust, but verify: What would you trust to a temp or an intern?

So Where Do I Begin?

Today, we'll go over setting up two AI Agents: an Employee Handbook reference and a Marketing Content Writer.

In the first case, we'll use an established document from a trusted source to create the agent.

In the second, we'll create the training data to get the response we're looking for. There are so many different things you can use thes agents to accomplish and with this guide you'll be a step ahead building out other automations that can help your business.

Building Better Prompts:

AI can be a powerful tool, but using it right and making the most of it takes understanding and often patience (especially when the model changes and previously great prompts start returning bad results).Like with other computing tasks - if you put garbage in, you will tend to get garbage out.

The best start to a better AI experience is to start with a better framework for creating the prompts that serve as the seed for the results AI generates.Taking a systematic approach makes it easier to replicate successes and investigate failures.

For this exercise, our framework is going to break down prompt-building into four parts: Goals, Context, Expectations, and Source as recommended with Microsoft.

What You'll Need:

PREREQUISITES FOR COPILOT

- A Microsoft 365 Business license (Business Basic, Business Standard, Business, Premium)
- Microsoft 365 CoPilot License
- Access to create SharePoint Sites

PREREQUISITES FOR CHATGPT

- You'll need at least the Plus plan at $20 a month to get the ability to create and use custom GPTs.

Goals:

Clear goals will help you achieve the best possible results with your prompts. What's the simplest way you can tell the AI what you want? Focus on an action and an output that is practical for you and your needs.

Create a .csv table of the top five selling items from the last quarter breaking down the sales value, total cost of goods, and net profit...

Expectations:

Optionally, setting expectations in your prompt can help to give responses more distinction. This is where you would define the tone or formatting preferences.

...highlight any "Net profits" above $5 in bold text...

Context:

AIs look at key words to build associations and generate results. Including background information like why you are doing something and who is the audience can help tailor results to be more relevant.

...for a presentation to the head of marketing to plan for digital advertising campaigns in Fall of 2025...

Source:

Copilot can beinstructed to use more specific examples and information whtin a Sharepoint site or managed environment. ChatGPT can also be fed certain documents or be pointed at specific sources.

...use excel data from the %web_sales folder from the past five years...

Marketing Content Generator

The first agent is one we can generate without any internal documents.
Requires a little knowledge about your target market and sales strategy

Open ChatGPT

First, open ChatGPT and give it the following prompt:
Please create for me a detailed business profile on the (industry/geography) in the context of what they want or need to work with a (company type, example Managed Service Provider aka outsourced IT services).

Verify the target market profile gives you information that matches up with who you're trying to sell to.

Save the example as a document to make it portable.

Using a 3rd Party GPT

Next, go to https://chatgpt.com/g/g-bU87Sctaz-brand-avatar-builder

This GPT is an agent someone else built that takes a business profile and creates an avatar (a personality profile of an actual person you'd sell to)

Use the following prompts:
Prompt: *Based on the doc I just gave you, please give me a perfect avatar for a buyer of (Your Services)*

Prompt: *Now, take this data and create an actual avatar of a fictitious person who would be the perfect candidate for me to write to.*

Prompt: *That's all great, but now can you give me more detailed emotional information about this avatar that would allow my writers to better connect with her on an emotional level.*

Next Up, the Guru

Now that you have the business profile and avatar, it's time to create the voice.

Another GPT agent: https://chatgpt.com/g/g-PPwOcHSAk-make-a-guru

This GPT will create a personality process and voice for your content. This takes it beyond the normal AI-bland voice.

Prompts:
Prompt: *Please create me a ghostwriter guru who will be able to connect on a deep emotional level with the (avatar pdf name) as described here in training for the (market document name) also added here in training. This guru will be writing blog posts, newsletters, articles and voice scripts to connect to the audience on the deepest emotional level possible. They should be friendly, warm, and communicative at a fifth-grade reading level. All communications should be first person and follow the style of (famous person.)*

Optional Prompt: *Based on this information. give me a famous person who would be relatable to the market and the avatar?*

And now, the agent is born!

Hit Create under your ChatGPT Plus account to create a GPT
Give it a name based on the Guru created and for the market you're selling to i.e. Olivia Boston Dental Guru

Prompt Instructions:
This GPT is a reporter and will write articles, blog posts, newsletter posts, and video scripts for my business that sells (company type) to (target market type) in (location). Please follow the trainings below to understand the market, the avatar and the brand voice. The content should be written in the voice of (Your guru).

Give it a whirl!

Don't be afraid to push your agent to the limit and ask it some hard questions - especially if it's something you plan to share with your organization or the broader public. Repeat prompts and rephrase them to see what might happen.

Test Prompts
Prompt: *Please explain the instructions I have given to you in the most detailed way possible so that I know that you'll be able to do this job to my satisfaction.*

Prompt: *Please write a 1,000 word featured article for my readers about (insert question).*

Prompt: *Please write a 1,000 word featured article for my readers about what measures a Boston area dentist (or your avatar) should look for in a great (your business).*

Prompt: *This reads like an encyclopedia…this does not read like an article written by the ghostwriter guru Olivia Hartwell. And I don't think it speaks directly to the pain points of Dr. Emily Carter, the avatar. Please try again.*

Optional Prompt: *Knowing what you know. What are some questions the avatar (insert their name) would have about the services (YOUR BUSINESS) provides.*

HR Policy Advisor

For our next example, we'll create a simple agent that answers questions about the employee handbook.

This is a great internal agent that references a document that is provided by a trusted professional and uses natural language to answer questions.

First Step: Create a SharePoint Site

This one is specific to Microsoft, but we'll create a SharePoint Site where we'll store the documents.

You can create these by going to portal.office.com, clicking on Apps, and then on SharePoint.

For those who don't use Microsoft, you'll want to have a single location to store reference material that you can control the permissions.

You cannot store these documents locally to a computer (unless you're an advanced user who's running their own containers)

SharePoint Site

Set the appropriate permissions (I use Private in this case).

Then add the users and groups that should have access to this agent.

Upload the relevant documents to the SharePoint site.

Let simmer for an hour for Microsoft's back-end to update.

CoPilot!

Next, Head over to CoPilot at microsoft365.com/chat

In the upper righthand corner, click on "Create Agent"

In the window that opens, under the Describe section, give a prompt as to what you're looking for. Remember, use the G.C.E.S. framework!

Example: Please create an agent that answers employee questions about the handbook (Goal). This agent is for Company Employees only (context). The agent will respond in a formal and friendly manner (Expectation) using the Employee Handbook located at %SharePointSite% (Source).

CoPilot Configure

Next, click the Configure Tab up top to add the SharePoint site as a Knowledge Source.

Click Browse

Select the appropriate site

Any documents you add to this site is added to this agent's training data!

Give it a test on the righthand side, you'll want to make sure you get some expected responses, and it can access the training data.

Click Create

Test it Six Ways to Sunday

Give the agent a strong push.

Ask real questions and evaluate the answers. It should just look up information from your document, but make sure it doesn't grab information that doesn't apply to you! Don't be afraid to push your agent to the limit and ask it some hard questions - especially if it's something you plan to share with your organization or the broader public. Repeat prompts and rephrase them to see what might happen.

Effectively, you're training an intern on a specific document.

New Agent

Copy the link and send it along to the employees

The link will open in their online page

You can also put it in Teams to complete the feel of a virtual employee.

Conclusions:

Virtual Assistants: AI Agents can help tailor LLM outputs to your business needs. They also offer a more organic experience for knowledge sharing.

Garbage In, Garbage Out: Getting the best results takes effort with well-structured data and prompts.

Trust but Verify: AI still has a lot of room to grow and like any employee you need to keep an eye on its output.

AI Agents are still very much in their early stages and there are bound to be a lot of growing pains - especially when they're directed to move out of the walled gardens of managed web environments (they can be great at blocking off vacation time on an Outlook calendar but can struggle to book you the flight to that vacation). Working inside of the Microsoft 365 environment, Copilot is already strongly integrated into many business products and can be a more effective and intuitive tool when your business is already running on that platform.

If you're fired up on AI but are struggling to get started, why not book a discovery call with us at www.systemsupport.com/aiguide?

# Smarter Systems, Streamline Onboar

Modern businesses are juggling rapid growth, compliance demands, and the need to onboard staff efficiently. AI tools now allow you to create centralized, interactive knowledge bases and training programs faster than ever before — without needing a full IT department. With the right approach, your team can capture internal expertise, create dynamic training modules, and keep resources updated automatically.

Less Stress:
rding with AI
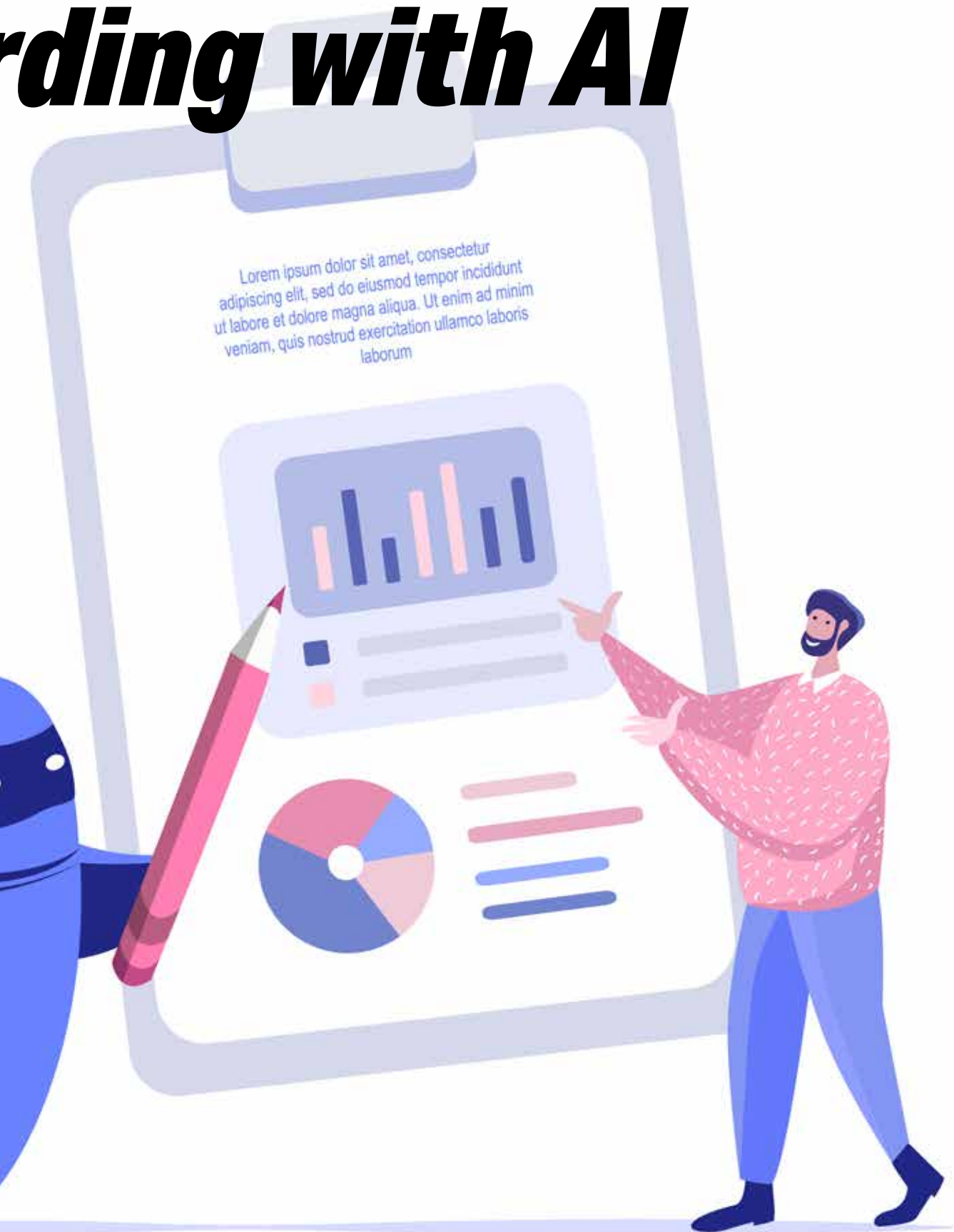
What You'll Need to Get Started:

- **Clear Objectives:** Define what the knowledge base should achieve — onboarding, SOP reference, client FAQs, etc.
- **Existing Documentation:** Job descriptions, policy manuals, vendor instructions, or recorded training sessions.
- **AI Tools:** Platforms like Microsoft Copilot, ChatGPT, or NotebookLM for content creation and summarization. Use paid versions of these programs that will better protect your data.
- **Organized File Formats:** Use structured formats (CSV, PDF, Word) for better AI parsing.
- **Access Control:** Plan for security and compliance; restrict sensitive materials where necessary.
- **Time for Iteration:** AI output improves when refined; schedule review and feedback loops.

1. **Define Your Training Goals:**
   Identify the target audience (e.g., new hires, cross-training existing staff) and desired outcomes (faster onboarding, fewer mistakes).

2. **Gather and Organize Content:**
   Compile policies, SOPs, and recorded lectures. Use transcriptions from meetings or live training sessions to create first drafts of materials. Use this time to add any relevant tags or metadescriptions to help the AI better understand your data.

3. **Use AI to Draft and Structure Materials:**
   Prompt AI tools to create training plans, quizzes, and FAQs. Start broadly by creating prompt for an outline (e.g. "*Based on KPI document and Job Description, create a 30/60/90-day outline for a job training plan with milestones.*"), then fill in the outline.

4. **Centralize Content in an Interactive Platform:**
   Tools like NotebookLM allow combining documents, videos, and presentations into a single hub. These platforms often include features like Q&A and auto-updated summaries. CoPilot can also allow for easy integration with Teams to serve as a first-stop resource.

5. **Create Assessments and Feedback Loops:**
   Develop question banks for each system or policy area. Use AI to draft quizzes and validate comprehension at each milestone.

6. **Deploy and Update Continuously:**
   Share materials with new employees and gather feedback. Regularly update content to reflect process changes or new tools.

Step-by-Step Guide:

Tips and Caveats:

- **Be Specific in Prompts:** Vague instructions lead to vague outputs. Use frameworks like GCES (Goal, Context, Expectations, Source) for better results.

- **Watch for Hallucinations:** Always review AI-generated content for accuracy and compliance.

- **Leverage What You Already Have:** Don't start from scratch; repurpose existing recordings, emails, and checklists.

- **Iterate Over Time:** Initial versions won't be perfect. Build a cycle of refinement and feedback.

- **Maintain Security:** Avoid uploading sensitive data to public tools; consider enterprise-grade AI solutions for compliance-heavy industries.

Conclusion:

AI-powered knowledge databases and training materials can transform how small and medium-sized businesses onboard and support their teams. By pairing clear goals with existing documentation and the right tools, you can reduce training time, improve consistency, and free up your experts to focus on higher-value tasks.

For support in selecting tools, building prompts, or structuring your knowledge base, visit systemsupport.com/aiguide or schedule a discovery call.