



# Next-Gen Customer Service with AI-Driven Copilot Studios

- Presented by the Customer Relationship Management Practice





# Housekeeping

- Please silence your phones. If you need to take a call, feel free to step outside and come back in.
- Sessions are being recorded and will be available after.
- Please use this QR code to take the session survey before heading to the next session.
- Survey responses get you more entries into the raffle at the end of the day. (prizes included surface headphones, Smart Ray Bans, RayBan Meta Smart Bluetooth Glasses, and lots more).
- Wifi Info: BusinessTechnologySummit  
Password: journeyteam!



# Fun Facts about Brandon Gorton and Rigo Sierra

Win up to 1,000 points per answer

**In which town did Brandon Gorton grow up?**

## In which town did Brandon Gorton grow up?

Farmington, Utah

American Fork, Utah

Eagle River, Alaska

Gilbert, Arizona

## In which town did Brandon Gorton grow up?

Farmington, Utah

0%

American Fork, Utah

0%

Eagle River, Alaska

0%

Gilbert, Arizona

0%

# Leaderboard

| Rank | Player | Score |
|------|--------|-------|
| 1    | Jake   | 1,406 |
| 2    | Landon | 1,375 |

**What is one of Rigo's favorite hobbies?**



## What is one of Rigo's favorite hobbies?

Home Entertainment systems

Crochet

Snow skiing

Golf

## What is one of Rigo's favorite hobbies?

Home Entertainment systems

0%

Crochet

0%

Snow skiing

0%

Golf

0%

# Leaderboard

Nobody has responded yet.



| Rank | Score       |
|------|-------------|
| 1    | Low         |
| 2    | Medium-Low  |
| 3    | High        |
| 4    | Medium      |
| 5    | Medium-High |

# Presenters

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**BRANDON GORTON**  
CRM PRACTICE DIRECTOR

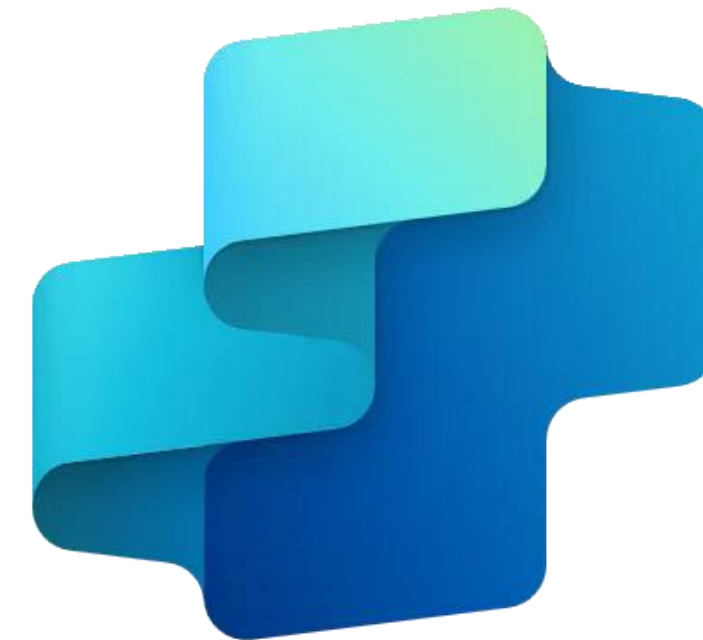


**RIGO SIERRA**  
SENIOR SOLUTION ARCHITECT



# What is Microsoft Copilot Studios?

Microsoft Copilot Studios is an AI-powered digital assistant that combines large language models (LLMs) with your data from Microsoft 365. It aims to enhance productivity and assist with various tasks.





# Overview

- **Personalized Assistance:** Copilot Studios provides personalized help across different activities.
- **Integration with Microsoft 365:** It leverages data from your calendar, emails, chats, documents, and more.
- **Low-Code Conversational AI:** Copilot Studios assists in building intelligent bots using natural language to generate topics, trigger phrases, and responses.
- **Content Generation:** It can create content, analyze data, and visualize insights.
- **Multilingual Support:** Copilot Studios handles inquiries in multiple languages

# Why Copilot Studios?

- Real-world scenarios where Copilot shines.
- Efficiency, scalability, and cost savings.
- Enhanced customer experiences.

## • Custom AI Models and Automation:

- **Tailored AI Models:** Copilot Studios can create custom AI models specific to your organization's needs. These models can automate repetitive tasks, enhance decision-making, and improve overall efficiency.
- **Process Automation:** By leveraging AI, Copilot Studios streamlines processes, reducing manual effort and minimizing errors. From data extraction to document processing, automation can significantly boost productivity.

## • Content Generation and Creativity:

- **Creative Writing:** Copilot Studios generates engaging content such as blogs, articles, and marketing copy. It can assist in crafting compelling narratives that resonate with your audience.
- **Poetry and Lyrics:** Need a catchy jingle or heartfelt poem? Copilot Studios can compose original poetry, lyrics, or even witty slogans for your brand.

## • Data Analysis and Insights:

- **Predictive Analytics:** Copilot Studios analyzes historical data to provide insights into trends, customer behavior, and market dynamics. Use these predictions to make informed decisions.
- **Visualizations:** Copilot Studios creates data visualizations like charts, graphs, and dashboards. These help convey complex information in an easily digestible format.

## • Customer Service Enhancement:

- **AI-Powered Customer Support:** Copilot Studios assists customer service agents by suggesting context-aware responses, summarizing cases, and drafting emails. This improves response time and accuracy.
- **Multilingual Support:** Copilot Studios can handle customer inquiries in multiple languages, ensuring a seamless experience for global customers.

## • Innovative Product Ideas:

- **Brainstorming Sessions:** Copilot Studios collaborates with your team to generate fresh ideas for products, features, or services. It sparks creativity and encourages out-of-the-box thinking.

## • Security and Compliance:

- **Privacy and Compliance Checks:** Copilot Studios ensures that generated content adheres to privacy regulations and organizational policies. It avoids sensitive information leakage.





# Use Cases

# Use Case Examples

- **Identify Project Management Rates based on number of users:**

- Copilot can be connected to SharePoint data sets that include key internal pieces of information for processes that still require a human touch, or that have not yet received automation components.
- End users can interact with the copilot through chat interfaces, websites, or mobile apps.

- **Sales Support and Issue Resolution:**

- Copilots can assist with sales inquiries, product information, and troubleshooting.
- End users can ask questions, seek guidance, and receive prompt responses from the copilot.

- **Store Information and Hours:**

- Copilot Studio can provide details about store locations, operating hours, and services available.
- End users can quickly access this information through chatbots or other channels.

The screenshot shows a chat window with a dark teal header labeled "Chat" containing refresh and close icons. The chat history includes:

- A bot message (green icon) with the text: "Hello, I'm JourneyTEAM Demo Bot, a virtual assistant. Just so you are aware, I sometimes use AI to answer your questions. If you provided a website during creation, try asking me about it! Next try giving me some more knowledge by setting up generative AI." with a timestamp of "Just now".
- A user message (blue icon) asking "what are the project management rates?" with a timestamp of "Just now".
- A bot response (green icon) providing a list of rates based on hours: "The rates for project management vary based on the number of hours required. Here are the rates based on the number of hours [1]:"
  - 50 hours: \$2,000
  - 200 hours: \$3,000
  - 600 hours: \$4,000
  - 1400 hours: \$5,000
  - 5000 hours: \$15,000The response also includes a note: "Please note that these rates are subject to change and may vary depending on the specific project requirements. [1]" and a "1 reference" dropdown menu. Below the dropdown is a citation box containing "1 Citation-1".

At the bottom of the chat window, it says "Just now | Surfaced with Azure OpenAI" followed by thumbs up and thumbs down icons.

# Use Case Examples



- **Employee Health and Benefits:**

- Copilots can handle employee queries related to health benefits, vacation policies, and leave requests.
- End users interact with the copilot to get personalized information.

- **Common Employee Questions:**

- Copilot Studio assists with routine employee inquiries, such as HR policies, IT support, and company procedures.
- End users can engage with the copilot to find answers efficiently.



# Copilot Studios Chat Bot Demonstration

1. Create copilot
2. Add data sources
3. Set content moderation
4. Review topics & entities
5. Engage copilot
  - Website topics
  - Document topics

The screenshot shows the Copilot Studio web interface. The browser address bar displays the URL: `copilotstudio.microsoft.com/environments/Default-6229b3b9-0be0-42a0-ab89-34eb864a3589/botlist`. The left sidebar contains navigation options: Home, Copilots, Plugins (preview), Prompts (preview), Models (preview), and Power Platform. The main content area is titled "Copilots" and features a search bar and a table of existing copilots.

|  | Name                         | Type              | Modified by ↓                         | Last published | Owner     |
|--|------------------------------|-------------------|---------------------------------------|----------------|-----------|
|  | Copilot Bot for JourneyTEAM  | Copilot           | # PowerVirtualAgentsProd 21 hours ago | Never          | John Galt |
|  | Copilot Bot for Davis County | Copilot           | John Galt 25 days ago                 | Never          | John Galt |
|  | DemoBot (classic)            | Chatbot (classic) | John Galt 08/02/2022                  | Never          | John Galt |



# The Case for Conversational Chatbots

# Outcomes

1. **Efficiency and Productivity**
2. **Enhanced Customer Experience**
3. **Scalability and Consistency**
4. **Cost Savings**
5. **Data-Driven Insights**
6. **Multichannel Support**





# Sales Co-Pilot offer

**Weekly Coaching Sessions:** To help your company be successful in a self-guided implementation with the focus on:

- Following best practices of Sales Copilot to support multiple aspects of the Employee Experience
- Guiding conversations to ensure that each organization is focusing on meeting business objectives and strategic initiatives
- Adoption and change management

**Workshops:** To give your company guided training and instruction to learn the basics of each Sales Copilot module:

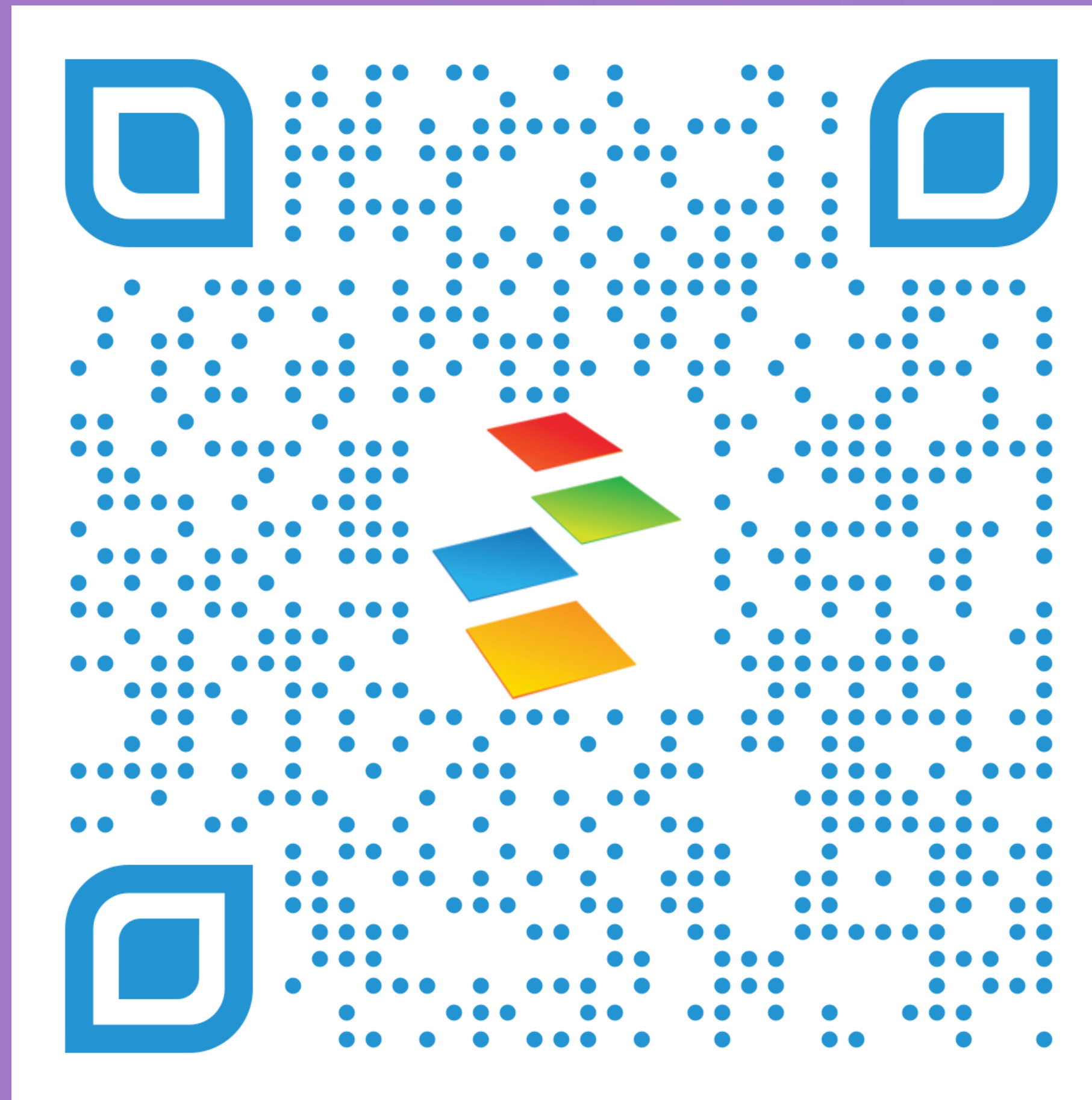
- Engage – Connections – Learning - Topics - Insights – Goals: **\$6,500**





**Q & A**

**We love feedback!**  
Please complete  
the session survey **for an  
extra giveaway raffle ticket!**





# Thank You!

**Let's Connect: Brandon Gorton & Rigo Sierra**

**[info@journeyteam.com](mailto:info@journeyteam.com)**

