INTELLIGENT TECHNICAL SOLUTIONS

Microsoft 365

Transform banking with Microsoft 365 Copilot

How to tailor your AI solutions



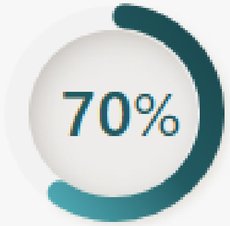
AI is how work gets done, and Microsoft 365 Copilot can be the UI for AI at your bank.

As you integrate AI into your workflows, we can be a crucial partner in unlocking the full transformative potential of Copilot by enabling significant productivity gains, enhancing innovation, and streamlining work.

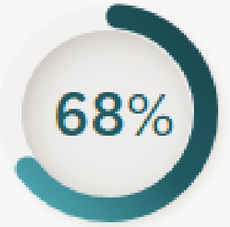
And because we know that banking requires a focus on industry regulations and compliance policies, we can help enforce guardrails to keep data safer and private information more protected from incorporation in large language model training.

In this e-book, let's explore scenarios in your banking business and discover how Copilot can:

- Enhance banker productivity
- Build deeper client connections
- Transform market research and financial reports
- Boost organizational agility



Of users say Copilot makes them more productive.



Report improved work quality." [1]

1. Microsoft Work Trend Index

Enhance banker productivity

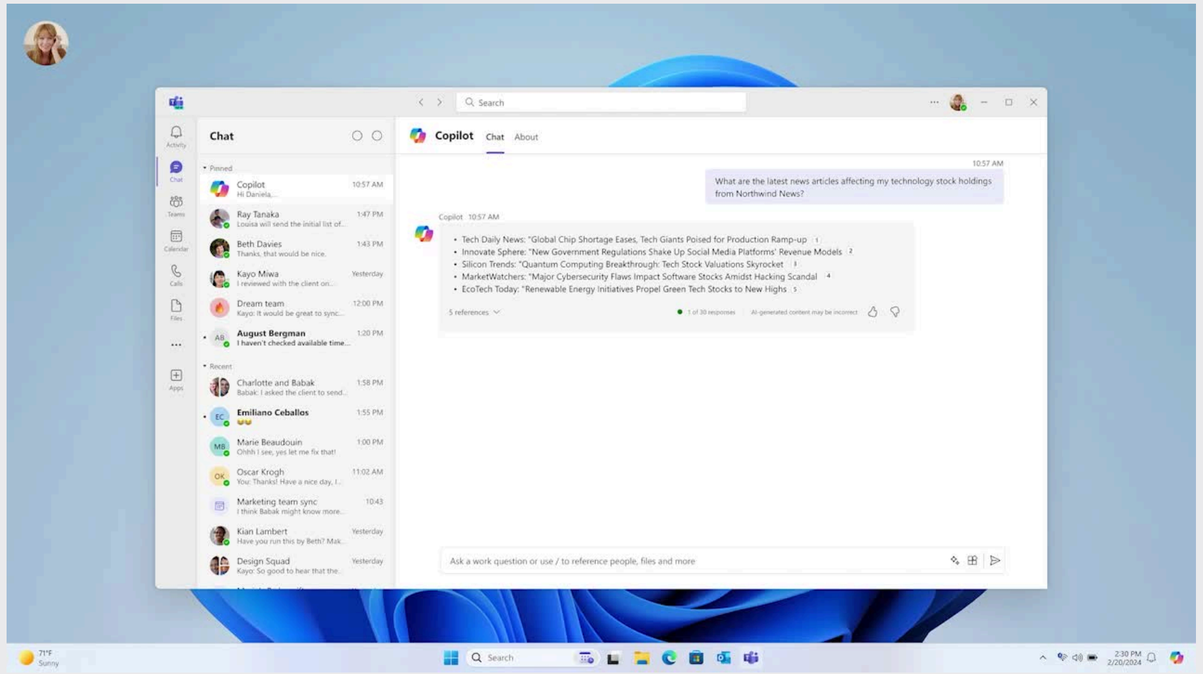
Your advisory, sales, and relationship manager roles play a pivotal part in enabling institution-wide productivity and defining key business workflows to drive innovation. With increasing adoption of generative AI tools, banking teams are empowering employee efficiency and transforming customer experiences.

Copilot use cases

- AI agents can assist financial advisors by automating routine tasks such as data analysis, portfolio rebalancing, and risk assessment.
- Copilot provides personalized insights, enabling advisors to make informed and impactful financial decisions faster.
- AI handles repetitive tasks, so all departments can focus on building stronger client relationships and providing strategic advice.

Outcome

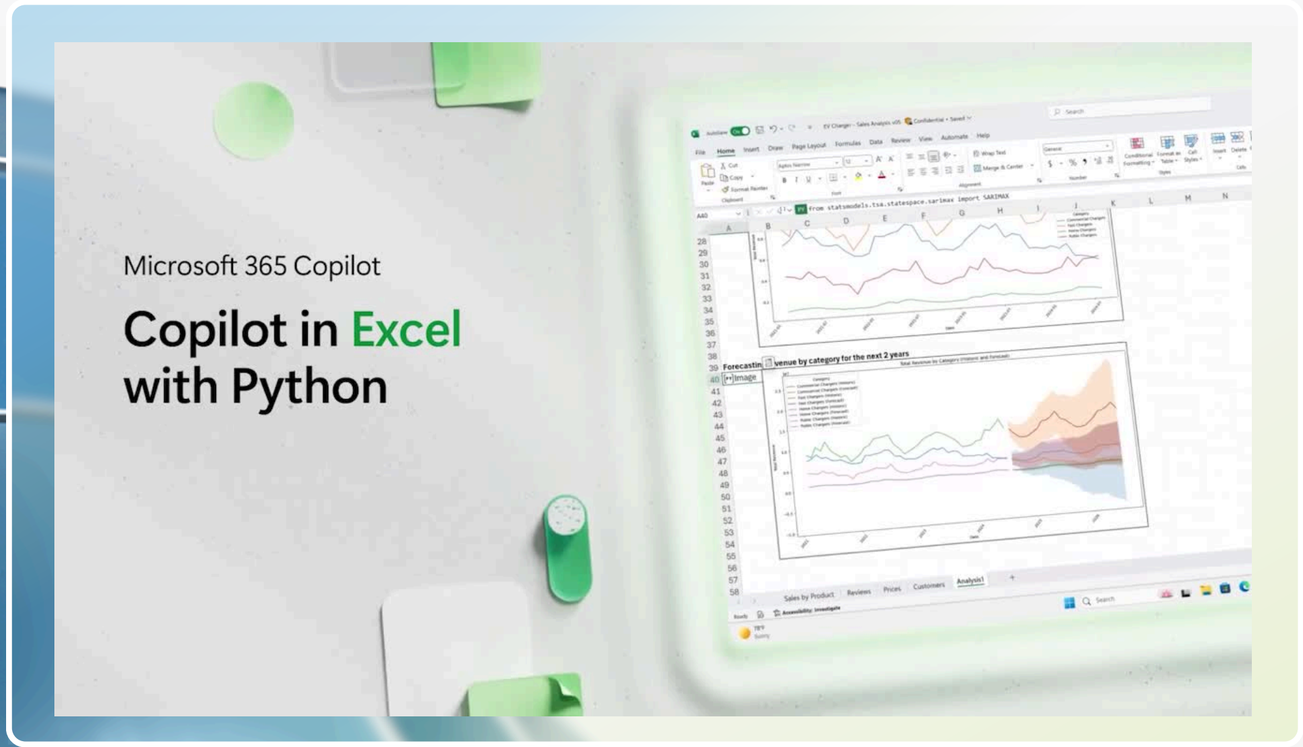
Revolutionized employee and customer experiences



Prompt:

Add a column that shows year-over-year in percentage increase in sales numbers. Please include a color scale to show year-over-year changes.

Build deeper client connections



Prompt:

Copilot, create a presentation from the FY24 Earnings Report.

Often a crucial first point of contact between a customer and the bank, customer service teams provide personalized interactions, offer timely resolutions, and deliver positive experiences that drive customer satisfaction and loyalty. Microsoft 365 Copilot can revolutionize these processes by automating repetitive tasks, centralizing data access, and providing actionable insights. With the ability to connect seamlessly to systems like ERP, CRM, and Microsoft SharePoint, Copilot reduces manual effort and ensures smooth coordination across operational teams.

Copilot use cases

- Copilot automates routine client management tasks and enhances customer interactions.
- AI handles inquiries, provides real-time information, and guides clients through banking processes and industry requirements.
- Agents summarize customer data and can generate tailored financial plans.

Outcome

Freeing up human agents to address complex issues and build deeper client connections

Transform market research and financial reports

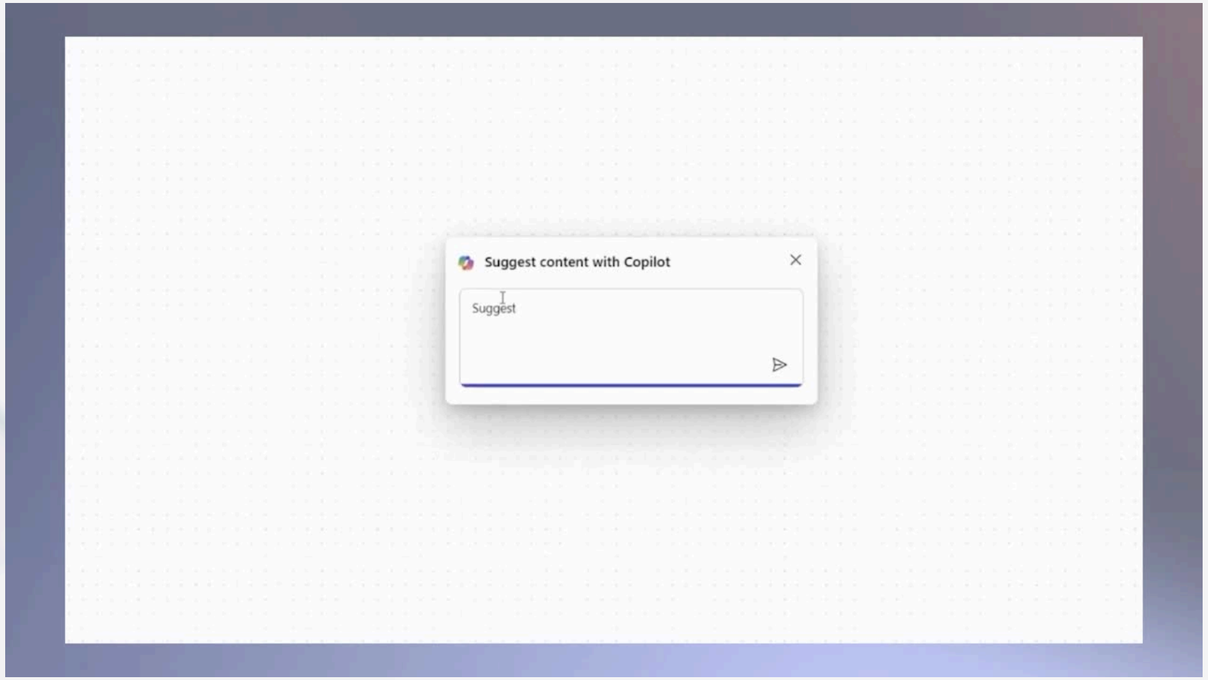
Microsoft 365 Copilot empowers financial teams to deliver effective reports with greater efficiency and precision. By scanning through vast amounts of data, identifying key trends, and extracting relevant insights, Copilot enables branch managers to quickly generate concise summaries, highlight critical information, and even visualize data through charts and graphs.

Copilot use cases

- AI algorithms can process vast amounts of financial data from research reports, news articles, and market trends.
- Copilot extracts key insights, summarizes findings, and presents actionable information to traders and analysts.
- Agents can autogenerate visual displays and reports, turning complex financial numbers into digestible content.

Outcome

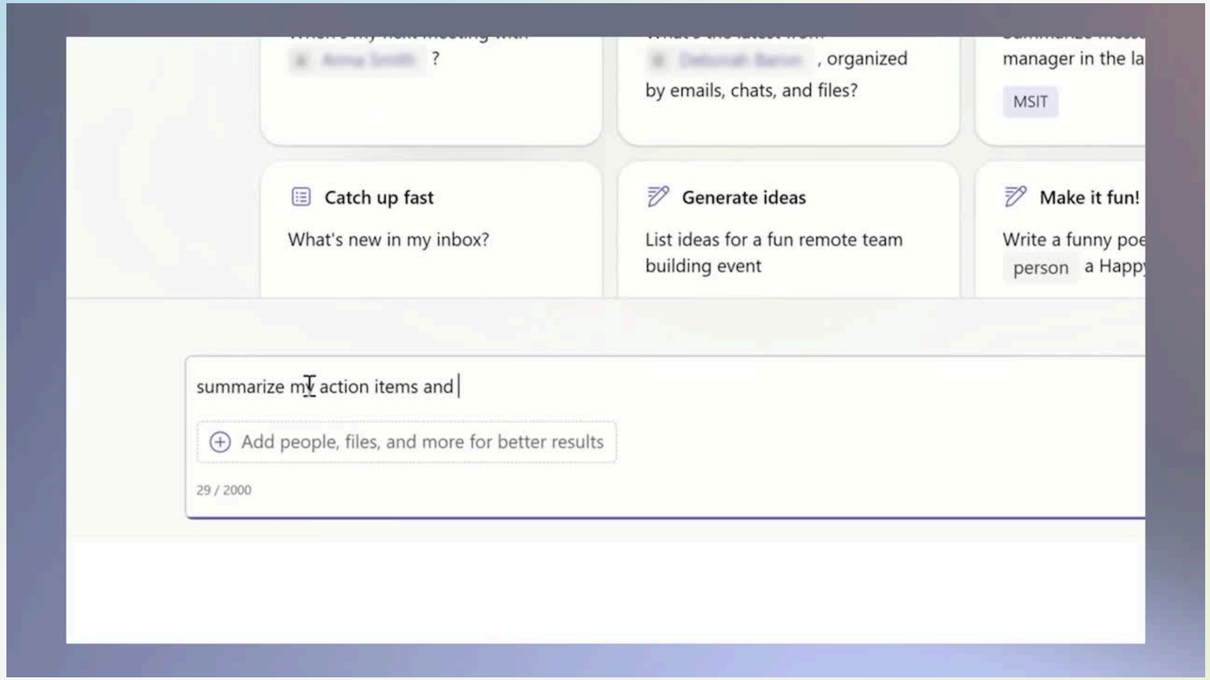
Revolutionized employee and customer experiences



Prompt:

Suggest the best Copilot uses for the audit team and organize them into categories.

Boost organizational agility



Prompt:

Copilot, summarize my action items and propose a schedule to allot my time tomorrow.

Banking teams often face the challenge of balancing administrative tasks with customer engagement, leading to inefficiencies and missed opportunities. Microsoft 365 Copilot addresses these challenges and streamlines workflows allowing your teams to focus on improving customer experiences.

Copilot use cases

- AI enables faster trade execution, risk assessment, and regulatory reporting.
- Copilot automates compliance monitoring to continuously monitor regulatory changes and ensure that a bank's operations comply with the latest requirements.
- AI-powered chatbots and virtual assistants can handle routine customer inquiries and transactions.

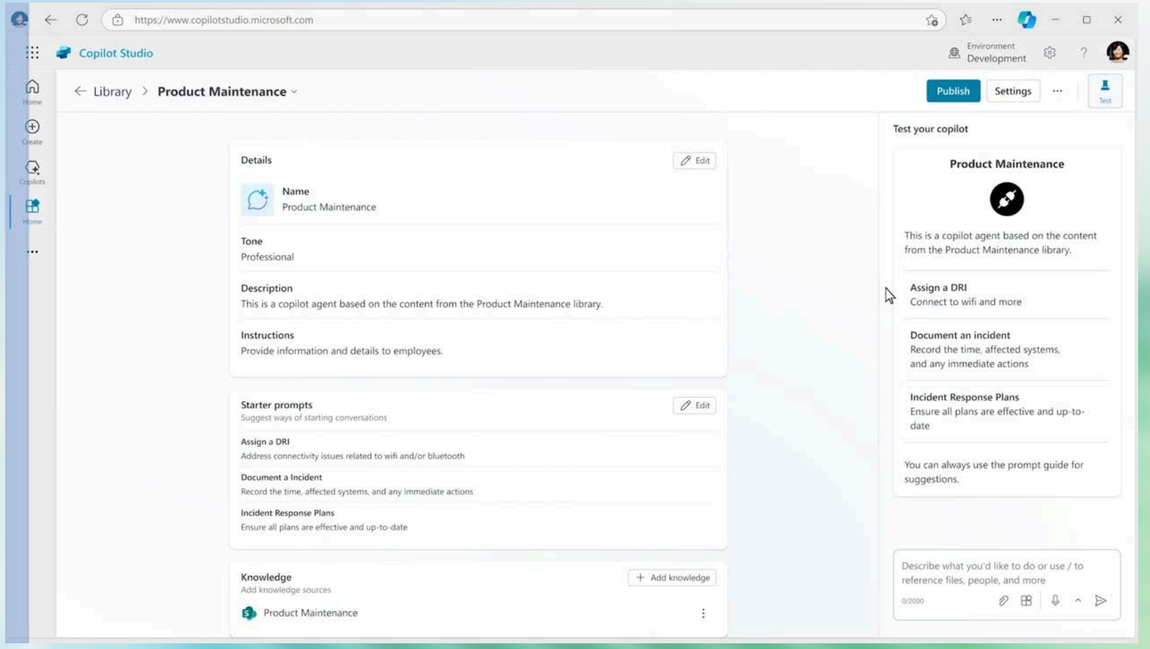
Outcome

Increased responsiveness to customer requests and market changes

Differentiate with Copilot Studio

Copilot Studio enables banks to create customized agents tailored to their specific needs. Unlike generic AI, it allows financial institutions to design agents that reflect unique workflows and financial data. With a low-code/no-code interface, teams can quickly build and deploy AI agents that integrate with your legacy systems.

Using over 1,200 prebuilt connectors, Copilot Studio enhances versatility by accelerating innovation and adapting AI agents as needs change. The platform is secure, scalable, and customizable, helping banking organizations reduce costs and create efficient, customer-focused AI experiences.



Example scenario: Building a custom customer service agent to handle FAQs and escalate complex cases
Outcome: Reducing operational costs and improving user engagement across departments

Transform banking with Microsoft 365 Copilot

Embrace the future of work with agents and Copilot Studio

Core benefits

Boost productivity:
Automate repetitive tasks and enable your banking employees to focus on strategic, high-value work.

Enhance collaboration: Seamlessly integrate into tools like Microsoft Teams, Word, and Excel to streamline teamwork and decision-making.

Build personalized agents:
Empower everyone to build custom solutions in a low-code interface using natural language.

Business outcomes

Cost optimization:
Reduce operational overhead by extending and adding features to accommodate changing needs.

Faster innovation:
Quickly adapt to changing business needs with customizable agents built in Copilot Studio.

Improved employee satisfaction: Relieve digital fatigue and enhance engagement by quickly automating mundane tasks.

Competitive advantage

Secure and compliant:
Maintain industry standards for governance, security, and lifecycle management.

Proven results:

70%

Of users report increased productivity.[1]

85%

Of users report creating first drafts faster.[1]

Scalable AI solutions:
Create knowledgeable, connected copilots across multiple channels and services—all in one comprehensive studio.

1. Microsoft Work Trend Index

1. 2024 Work Trend Index Annual Report

Copilot Chat

Are you looking to test out AI to better understand how to improve productivity at your bank? Introducing Copilot Chat: a free and secure AI chat solution that gives your users a standardized AI experience as you implement transformational strategies.

Provide your users with foundational AI functionality and opportunities to familiarize themselves with prompting best practices as you identify additional scenarios where Copilot can improve processes for your bank.



Microsoft 365 Copilot

Your AI assistant for work

Copilot Chat
Free, secure AI chat

+

Chat
Work-grounded

Copilot in Microsoft 365 apps
Teams, Outlook, Word, Excel, PowerPoint

Agents

Copilot Control System

Copilot Analytics

INTELLIGENT TECHNICAL SOLUTIONS

Microsoft 365

Partner-powered AI: Unlock the full potential of Copilot with expert guidance

Work with Intelligent Technical Solutions for optimal deployment of Microsoft 365 Copilot at your bank. We offer expertise in navigating complex areas such as data governance, compliance, and system integration, ensuring a smooth rollout. Accelerate time-to-value by partnering with us as you customize Copilot to align with your specific business needs, building tailored agents in Copilot Studio, and integrating AI with existing applications.

Additionally, Intelligent Technical Solutions provides ongoing support, training, and governance, helping your organization refine use cases and scale AI adoption over time. Maximize the impact of AI, achieve faster results, and drive meaningful outcomes.

Unlock the full potential of AI-power productivity today, contact Intelligent Technical Solutions for tailored deployment, guidance, and support of Microsoft 365 Copilot.