

Sales Success Simplified: Custom Copilot, the Ultimate Sales Assistance

Close Date	OU	Industry	Org Size	Deal Highlight	Products & Services	Partner	Customer	Competition
May 2024	SMC	Retail	2,000 employees	Custom Copilot Implementation	Copilot Studio, Power Automate, SharePoint, Teams	eGroup Enabling Technologies	Mathis Home	N/A

CHALLENGE	SOLUTION	OUTCOMES	TEAM
<p>Mathis Home relies on Retail Sales Associates to provide an exceptional in-store customer experience to generate sales. Sales Associates who cannot meet these goals results in turnover and lower revenue performance.</p> <p>A previous engagement with eGroup Enabling Technologies reviewed an existing collection of information and resources that had proven to be most valuable to sales associate success; however, it was cumbersome to use and maintain, and not consumable on smaller screens.</p> <p>Mathis Home sought to use Copilot Studio to create an easy-to-use chatbot to improve the associate experience, reduce turnover, and improve the overall customer experience.</p>	<p>eGroup Enabling Technologies Process Excellence and AI architects led the design of a custom copilot agent via Copilot Studio to deliver a chat bot experience for Retail Sales Associates. The copilot allows Sales Associates to be more effective by letting them search for answers that they would typically have had to find a manager to provide.</p> <p>The process began with defining the expected outcomes for every topic that the copilot should support. Leveraging Copilot Studio, Power Automate, and SharePoint Online, a custom copilot was developed and delivered to offer generative and non-generative topics to support Retail Sales Associates most requested information.</p>	<p>Mathis Home achieved two goals through this engagement: a fully functional and comprehensive custom copilot agent that has been deployed to all Retail Sales Associates and a framework to identify and design additional custom copilots for other business use cases.</p> <p>This implementation has proven where generative AI can offer value and how automation can execute repeatable actions and respond in conversational exchanges for easy consumption.</p>	<p>Account Executive Jennifer Rishling</p> <p>MW Security Specialist Shane Erickson</p> <p>Azure Security Specialist Carlos Calderon</p> <p>Partner Kevin Radigan, Account Executive</p> <p>Contractual Value (\$87K) Copilot Studio Tenant License</p>