

***Building the future faster
with Copilot Studio***



Introductions



Steven Fiore

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Power Platform Developer

End-to-End Microsoft Services

Lantern helps you thrive in the era of AI with a broad range of custom solutions that make the most of your Microsoft investments.

lanternstudios.com

Lantern combines the strength of three award-winning Microsoft partner organizations with decades of experience in driving innovation on the Microsoft platform.

20+
Years in Business

4,500+
Successful Projects

85%
Repeat Clients

Lantern boasts a **Digital Studio Network** that spans **North America**, offering complementary technical capabilities that can be quickly orchestrated and tailored to address business challenges of any size.

Digital & App
Innovation



Cloud &
Infrastructure

Modern
Work



Business
Applications

Security



Data
& AI



LANTERN

Agenda

- Copilot Studio Overview
- Demo Scenario, Solution & Architecture
- Demo
 - Customer Experience
 - Builder Experience
- Art of the Possible
- Next Steps

Getting Started

- What is your level of experience with Copilot Studio?
- Where are you in your Copilot Studio journey?
- What is your role and what do you hope to get out of today?

If you have any other questions about Copilot Studio and/or Lantern please feel free to drop them in our chat.

Surging digital demand

● 750M

more apps will be created in the next 5 years than in the last 40

● 50%

of digital work can be automated with current tech

Not enough developers

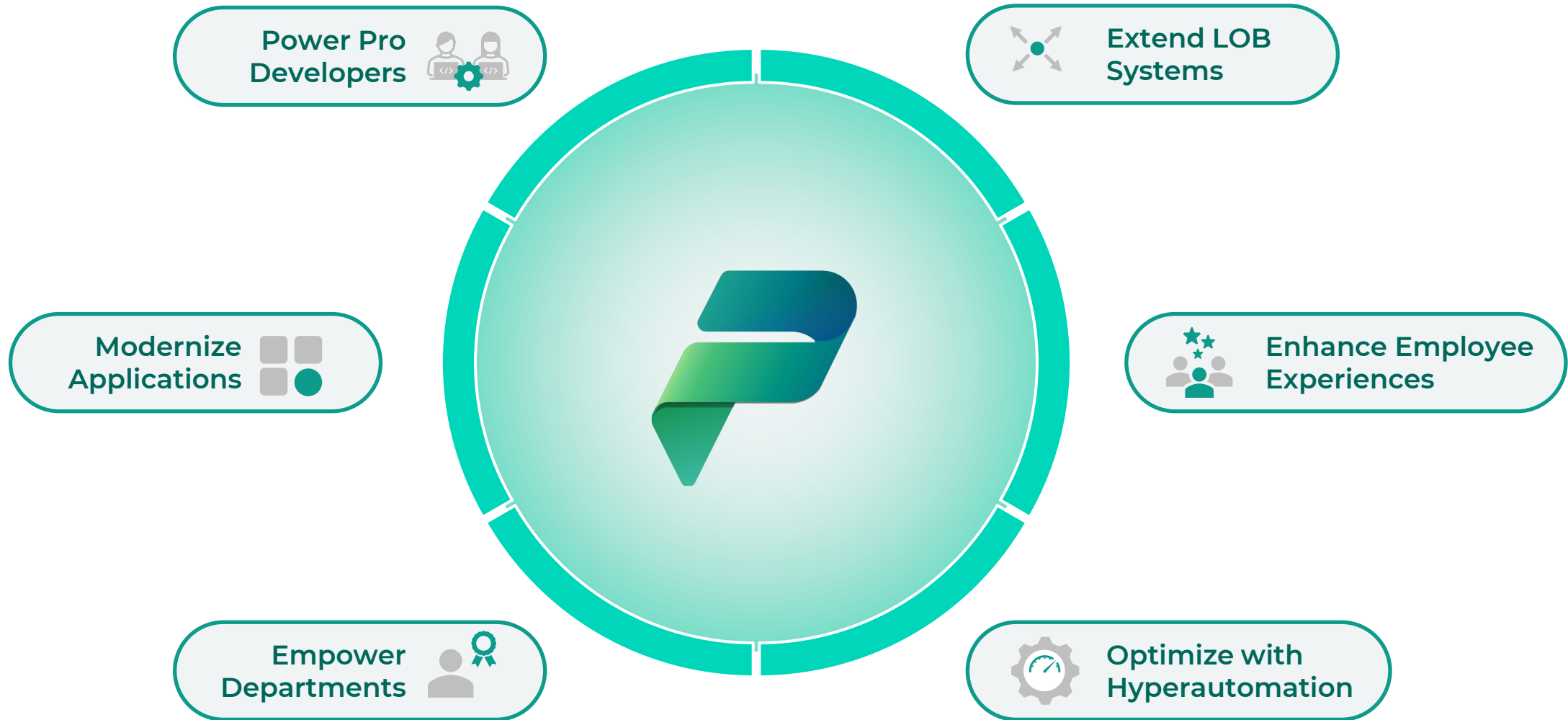
4M

developer shortfall

86%

of companies struggle to hire tech talent

Power Platform Patterns of Value



Momentum of AI

The top responses from 31,000 people survey:

86%

Want AI to assist with finding the right information and answers they need¹

Knowledge

76%

are comfortable using AI for administrative tasks¹

Action

70%

would delegate as much work as possible to AI to lessen their workloads¹

Autonomy

Combining low code development with AI is a game-changer

87%

CIOs & IT professionals say that increased embedded AI into low code platforms would help them maximize the technology¹

55%

of CIOs will leverage in-house developers and tools that use GenAI and low code/no code, as they and LOB developers build competitive differentiation through custom apps by 2026²

**Bend the curve
on innovation**

**Optimize business
processes**

**Enrich customer
and employee
experiences**

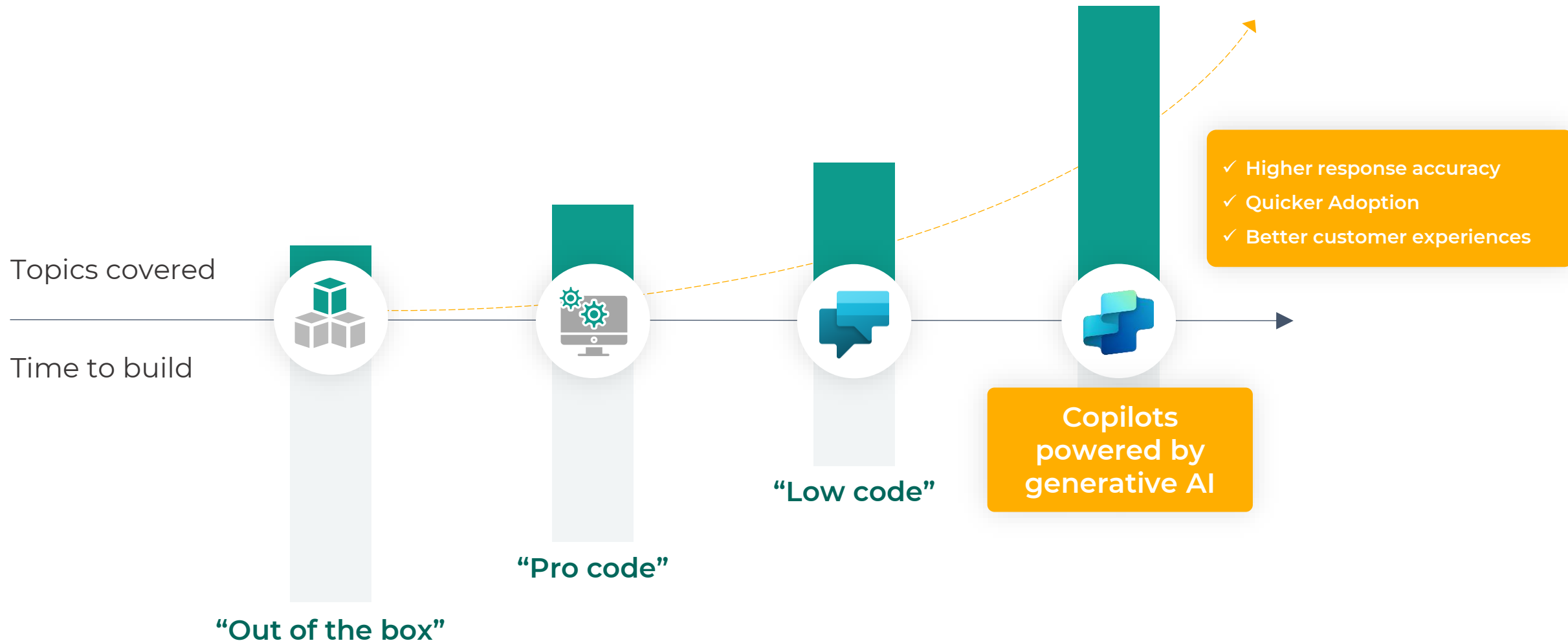
**Improve efficiency
& time to value**

**Reduce
development
costs & risks**

1. Source: Gartner® Press Release ,Gartner Identifies the Top Strategic Technology Trends for 2022, October 18, 2021. GARTNER is a registered trademark and service mark of Gartner, 2nc. and/or its affiliates in the U.S. and internationally and is used herein with permission. All rights reserved.

2. Source: IDC, IDC FutureScape: Worldwide CIO Agenda 2024 Predictions (Doc Document number:# US51294523, October 2023)

Welcome to a **new era** of building conversational AI





Copilot Studio

Copilot Studio is an end-to-end low code conversational AI platform for **extending Microsoft Copilot or building your own copilot** with generative AI and large language models.



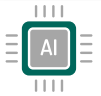
SaaS / no infrastructure management



Conversational orchestration

The screenshot shows the Copilot Studio interface for a solution named 'Northwind Trader'. The top navigation bar includes 'Copilot Studio', 'Northwind Trader', and 'Environment Production'. A left sidebar contains navigation options: Home, Building blocks (GPTs, Topics, Plugin actions, Prompts), Copilots (Create a copilot), and Extend Microsoft Copilot (Publish, Analytics). The main content area features a 'Boost your conversations (preview)' section with a text input field and a 'Use generative answers' button. Below this are three cards: 'Extend a Microsoft Copilot (preview)', 'Add plugins for dynamic chaining (preview)', and 'Meet people where they are'. Each card includes a brief description and a call-to-action button.

Create chat experiences that are...



Intelligent

Understand and hold context and intent through rules-based and generative LLMs.



Actionable

Dynamically complete tasks with your business systems.



Secure

Industry standards for governance, security and solution lifecycle management.



Connected

Grounded with 1,200+ data connectors & extensibility with broader Microsoft conversational AI services.

A screenshot of the TruGreen website. The page features a green header with the TruGreen logo and navigation links. The main content area has a large image of a lawn with a sign that says "TRUGREEN Live life outdoors". Below the image, there's a "GET STARTED" button. A virtual assistant chat window is open on the right side, titled "TruGreen Virtual Assistant". The chat window displays a greeting: "Hi! I'm your TruGreen virtual assistant. Please select from one of the following options." and a list of options: "Scheduling Information", "Billing & Payments", "Manage Account Settings", "Add or Change Service", "Login Assistance", and "Something Else". The chat window also shows the time "Virtual Agent - 3:59 PM" and a text input field with a "Type your message" placeholder.

Over 10,000 organizations use Copilot Studio today



**NATIONAL
BANK
OF CANADA**

Built a public-facing copilot in French and English in just 10 days



Built an HR/IT copilot for employees that reduced support costs and workload



Built a copilot to help customers find the right products for their specific needs



Built a copilot that now manages 25-40% of employee calls to their IT helpdesk











Built a copilot that helps citizens apply for building permits









Built a copilot that helps customers get answers and track packages

Build copilots that work for you

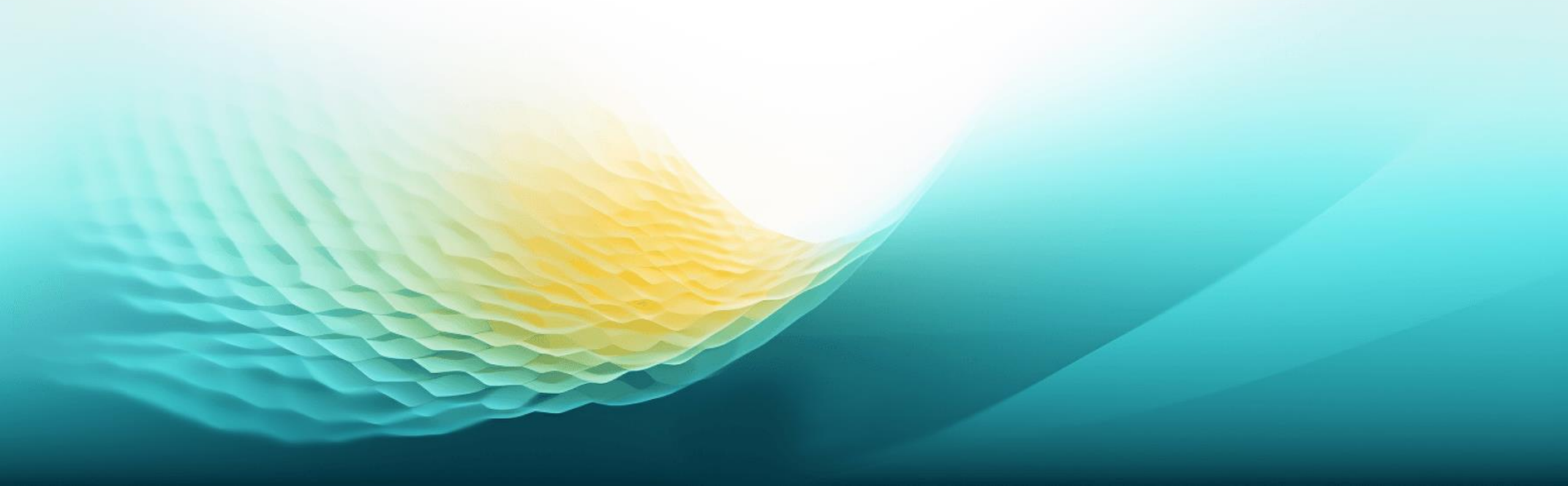
in your industry...

 Travel and Transport	Manage bookings	Change my trip dates
 Professional Services	Lead generation	Get a quote
 Government	Public programs	Get childcare assistance
 Retail	Manage orders	I want to make an exchange
 Healthcare	Claims	Submit health insurance claim
 Financial Services	Manage accounts	Report lost card
 Education	Admissions	How to get financial aid?
 Manufacturing	Supply	Check stock

...and department

Customer Service Reduce call volume for quick resolutions  Request a refund Describe your issue Support tickets Centralized FAQs	Finance Save time by automating budget and expense approvals  Update tax information Submit expenses for approval Payroll Budget requests	HR Improve employee satisfaction and retention  Sign up for healthcare plan Book time off Benefits Leave and absence
IT Optimize employee troubleshooting  Reset my password Refresh my laptop Support services Equipment requests	Operations Improve efficiency by digitizing paper processes  Find case file Check order delivery times Find documents Manage inventory	Sales and Marketing Increase up-sell and conversion opportunities  You're eligible for a free upgrade! Update your email preferences Upselling Email

Demo Scenario



Scenario

Lantern Financial had an internal support knowledgebase that consisted of documents filled with common questions and issues along with known resolution.

They decided to expose that knowledge base externally to create a self-service chatbot to reduce the number of support calls and increase customer satisfaction.



Why Copilot Studio for this Scenario?

With the advent of Copilot Studio and generative AI, bot creators can now bypass several time-consuming tasks that were once essential in traditional bot development:

-
- Sayonara:**
- Complex Integration Work**
 - Exhaustive Dialogue Pathing**
 - Hardcoding Responses**
 - Manual Topic Creation**
 - Extensive Training**
-

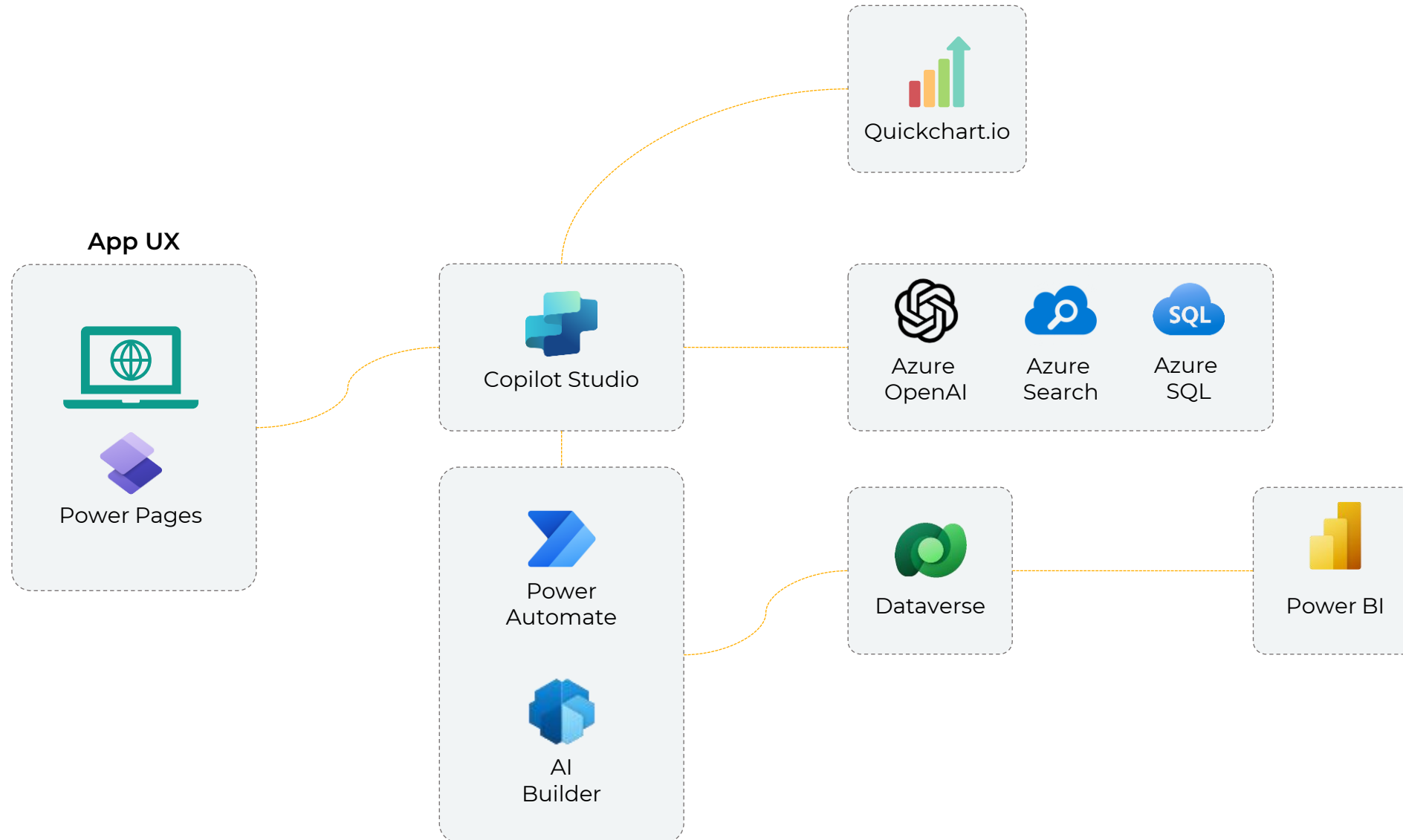
Scenario - Solution

Using Copilot Studio, they created a chat service that accessed the knowledgebase to answer customer questions much as you would with any chatbot. The power of Copilot Studio came in when they connected it to other support data sources such as databases, graphs, and external websites.

While this demo focused on potential new customers, the real benefit will come when Lantern Financial extends this to include authenticated existing customers since Copilot Studio's ability to connect to almost any data source will allow it to answer questions about the customer's accounts, history, previous requests for help, recommendations from their advisor, etc.

To track and improve customer satisfaction for the new service they implemented sentiment analysis to analyze the conversations and determine which answers were generating a positive customer reaction and more importantly, which ones weren't so the customer service team could review the poorly performing recommendations and make improvements.

Copilot Studio Demo Solution Architecture



Customer Demo – home page

Lantern Financial

Home Financial Resources About

Lantern Financial

Where we help you achieve your financial goals

Our team of expert financial advisors is dedicated to providing you with personalized solutions that fit your unique needs. Whether you're planning for retirement, saving for your child's education, or looking to grow your wealth, we're here to help. Trust us to guide you towards a brighter financial future.

9M	5,678	98%
Customers	Cases Completed	Satisfaction Rate

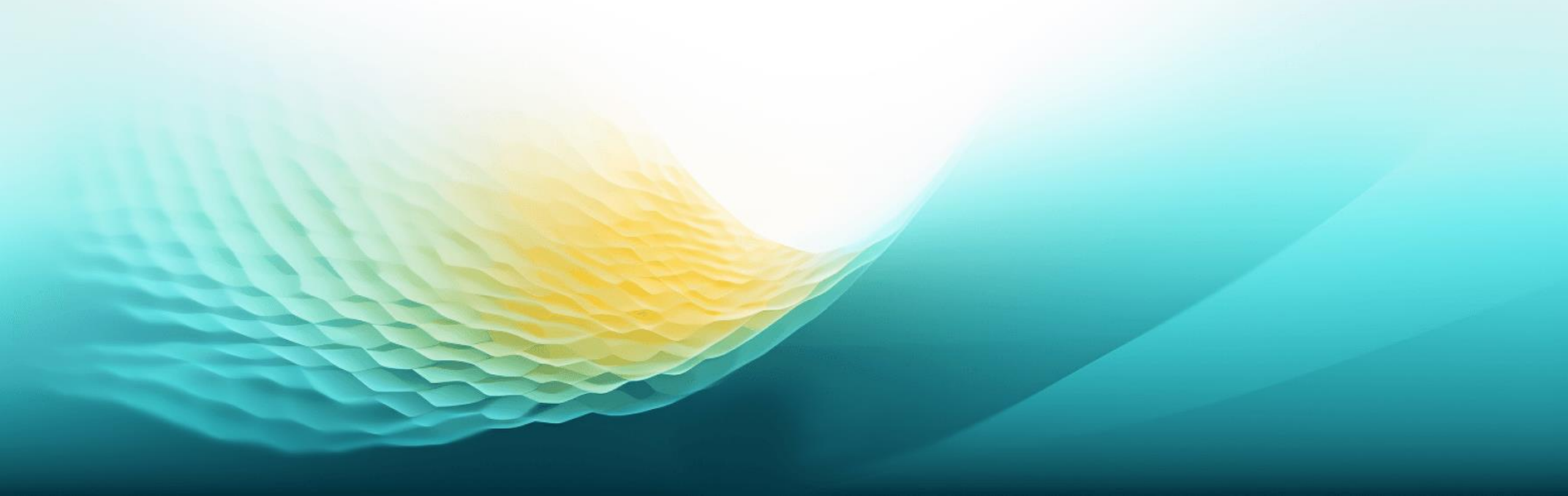
Whether you are an individual looking to grow your wealth or a business owner seeking to optimize your financial strategies, we have the expertise and resources to help you achieve your goals.

During a tailored experience with our financial advisor, you will receive personalized guidance and expert recommendations based on your unique financial aspirations and objectives. With a commitment to transparency, integrity, and client satisfaction you can expect the following benefits:

- Assistance in attaining your financial goals, whether it's retirement planning, investment expansion, or tax planning
- Collaboration with our seasoned advisors to devise strategies that optimize your financial potential
- A partner who prioritizes your financial well-being and supports you every step of the way

?

Art of the Possible



Deploy AI solutions **your way**

Copilot

Copilot Studio

Azure AI Studio



Product Copilots

“Out of the box”

Copilot for Microsoft 365
GitHub Copilot
Copilot for Microsoft Fabric
Copilot for Security

Extending Copilots

Augmenting and light
Customization

Use Copilot connectors to
add custom data to “OOB”
Copilots

Build custom copilot
solutions on your data

Create Custom Copilots

Deep Customization

Integrate Azure AI into your
applications

Build specialized AI apps for
your specific use cases

Update existing applications
with generative AI capabilities

Art of the Possible



Today's Scenario

External – Open Internet

Multilingual Customer Support Bot

Scheduling/Reservation Bot

Product Troubleshooting Guide

Event Feedback Collector

Retail Chatbot

Authenticated Portal

Customer Account Management

Learning Management System

Employee Self-Service Portal

Financial Services Portal

Healthcare Patient Portal

Internal to Organization

Employee Onboarding

IT Support

Knowledge Management

Meeting Assistant

Project Management

Next Steps

The background features a large, abstract graphic element. It consists of a series of overlapping, semi-transparent layers that create a sense of depth and movement. The colors transition from a bright yellow in the center to various shades of teal and blue towards the edges. The overall effect is reminiscent of a stylized wave or a textured surface.



Copilot Studio Quick Start

Launch a POC in 2-4 Weeks



Unlock the Power of AI with our Copilot Studio QuickStart!

In just 2-4 weeks, we'll take you from a discovery workshop to a tailored Proof of Concept!

- **Provision a Copilot in Copilot Studio**
- **Set up a Dataverse environment to host the Copilot**
- **Distribute the Copilot in Teams or in your website**

The Copilot provides actions and topics, generative answers using conversational boosting, and seamless integration with other systems via Power Automate (if applicable).

QuickStart Advantages



Quick Implementation

Get up and running in just weeks.



Tailored Solution

Customized POC based on your unique needs.



Enhanced Productivity

AI-driven assistance to streamline operations.



Scalable and Flexible

Adaptable solution that can grow with your business.

[Get Started Today!](#)



Unlock Business Value with Copilots

Kickstart your AI journey with the help of Copilots



Are you ready to start your Copilot journey but unsure where to begin?

Lantern's 3-hour workshop is designed specifically for organizations ready to explore Copilots and begin their Copilot journey. Lantern will guide you through a structured process to create a high-level Copilot Conversational AI roadmap tailored to your organization's needs.

- Copilots overview including some best practices examples
- Identify and work through industry and organizational challenges
- Identify Copilot solutions to address your specific challenges by engaging cross business decision makers
- Prioritize Copilot projects with an effort/impact matrix
- Create a high-level strategic roadmap to drive Copilot value
- Pinpoint impactful Copilot pilot projects

Why Attend?

- ✓ Establish Clear Copilot Business Objectives
- ✓ Align Copilot Initiatives with Strategic Goals
- ✓ Gain Practical Insights to Begin Your Copilot Journey

[Book your Workshop Today!](#)



Copilot Studio In a Day

Build a copilot using Microsoft Copilot Studio in this beginner-level course. Using a hands-on, step-by-step lab, attendees will get an understanding of how to:

- Easily create their own copilots
- Act quickly with seamless integrations
- Build copilots using generative AI and specific responses for personalized conversations

[Register Today!](#)

Thank you.

Find us at
LanternStudios.com

