

Empowering Businesses with Custom Copilots by CONEXIQ

EXECUTIVE SUMMARY

Custom copilots represent the forefront of enterprise AI solutions, providing targeted capabilities to streamline workflows and deliver business-specific insights. For organizations using Microsoft 365 and Dynamics 365, custom copilots by CONEXIQ open a new world of possibilities, from task automation to enhanced decision-making.

This whitepaper explores the methodologies, architectures, and tools required to develop these solutions. It also demonstrates their transformative potential across industries, including government, healthcare, retail, finance, education, and mining.

INTRODUCTION

CONEXIQ is leading the charge in enabling businesses to create AI-driven copilots that seamlessly integrate with Microsoft 365 and Dynamics 365 ecosystems. Unlike generic AI tools, custom copilots leverage extensions and declarative agents to deliver highly personalized and functional experiences.

This whitepaper outlines the step-by-step process for building custom copilots, emphasizing their potential to revolutionize operations across industries. Whether automating routine workflows, enhancing collaboration, or providing intelligent insights, custom copilots by CONEXIQ are designed to empower businesses of all sizes.

THE IMPORTANCE OF CUSTOM COPILOTS

Custom copilots offer unparalleled opportunities to enhance productivity, collaboration, and decision-making. Here's how CONEXIQ copilots stand out:

- **Enhanced Efficiency:** Automate repetitive tasks, such as scheduling and report generation, freeing up valuable employee time for strategic initiatives.
- **Tailored Experiences:** Custom copilots integrate deeply with your workflows, offering recommendations and automations that align with your business objectives.
- **Increased Collaboration:** By leveraging Microsoft Teams, Outlook, and SharePoint, copilots foster a collaborative environment that drives team success.
- **Data-Driven Decision Making:** Access actionable insights derived from Dynamics 365 data to optimize operations and deliver exceptional results.

KEY FEATURES AND CAPABILITIES

CONEXIQ custom copilots are built with cutting-edge features, including:

- **Contextual Awareness:** They understand the user's intent and context to provide relevant recommendations.
- **Multi-Platform Integration:** Seamlessly connect with Microsoft 365 apps (Word, Excel, PowerPoint) and Dynamics 365 modules (Sales, Marketing, Finance).

- **Advanced Query Handling:** Interpret and execute complex user queries with precision using declarative agents.
- **Automation and Workflows:** Simplify repetitive tasks through integrations with Power Automate, enhancing overall efficiency.

HOW TO BUILD CUSTOM COPILOTS

1. **Define Objectives:** Collaborate with stakeholders to identify core business challenges and opportunities.
2. **Utilize Microsoft Power Platform:** Leverage tools like Power Apps, Power Automate, and Power Virtual Agents to design no-code/low-code solutions.
3. **Develop Extensions:** Use Microsoft Graph API and Dynamics 365 SDK to add custom functionalities.
4. **Deploy Declarative Agents:** Train AI models to interpret user intent and deliver precise results.
5. **Test and Optimize:** Conduct iterative testing to refine copilot performance and ensure it meets user expectations.

APPLICATIONS ACROSS INDUSTRIES

Healthcare: • Automate patient record updates and streamline appointment scheduling. • Provide real-time insights for treatment planning.

Retail: • Enable personalized shopping experiences using customer purchase data. • Optimize inventory management through predictive analytics.

Finance: • Assist in generating financial reports and ensuring regulatory compliance.

- Automate reconciliation processes to reduce errors.

Education: • Create intelligent teaching assistants for personalized learning experiences. • Automate administrative tasks such as grading and attendance tracking.

Government: • Improve citizen engagement through AI-driven query handling and self-service portals. • Streamline grant applications and case management systems.

Mining: • Enhance operational safety by providing AI-driven alerts and compliance tracking. • Optimize resource management and extraction processes through datadriven insights.

FUTURE OPPORTUNITIES

The potential for custom copilots continues to expand as new technologies emerge. Generative AI, blockchain, and IoT integrations promise to elevate copilot functionalities further. Organizations adopting these innovations early will position themselves as leaders in their industries.

CONCLUSION

Custom copilots by CONEXIQ are designed to transform how businesses operate, offering tailored solutions that drive efficiency, collaboration, and innovation. By integrating seamlessly with Microsoft 365 and

Dynamics 365, these AI tools empower organizations to unlock new opportunities and achieve unparalleled success.