

Advanced Tuning for Microsoft Copilot

Combining enterprise experience through low-code fine-tuning with RAG-driven analysis

The better the question. The better the answer. The better the world works.

EY

Shape the future
with confidence



Business drivers

- Microsoft 365 Copilot is an artificial intelligence (AI) solution ecosystem with a spectrum of Copilot agents: Microsoft 365 Copilot to improve productivity, Copilot Studio Agents to boost efficiency and Copilot tuning to improve the accuracy, tone and relevance of Copilot responses.
- There is an accelerated shift to fine-tuned models as these unlock the full power of Copilot by aligning it directly to the organization's data, voice and workflows. Copilot tuning improves data access, compliance, user experience, data retrieval, augmentation, integration, automation and customization.
- Senior leaders of organizations are building custom AI solutions in house and focusing less on acquiring AI firms outright, which signal that organizations are strengthening their internal, bespoke AI capabilities.

Solution overview

Advanced Tuning for Microsoft Copilot highlights your organization's tone, knowledge and formatting to streamline tenant-specific processes and roles, targeting high-value enterprise productivity tasks. It extends Copilot capabilities:

- Application scenarios:** targets high-value enterprise productivity tasks, such as summaries, reports, validations and questions and answers
- Practical use cases:** improve document summarization, document writing and professional answers
- Model foundation:** processes fine-tuned small language model (SLM) that are trained on distinctive organizations' data, terminology and experience
- Customization:** allows tuning by the information worker or subject-matter expert with learned tone, knowledge and format

Advanced Tuning for Microsoft Copilot offers the following features:

- Microsoft 365 Graph data access
- Regulatory compliance and security
- Domain-specific augmentation
- User and enterprise tailoring
- Improved accuracy and data retrieval
- Workflow automation
- Time-to-value measurement and customization

Solution
design

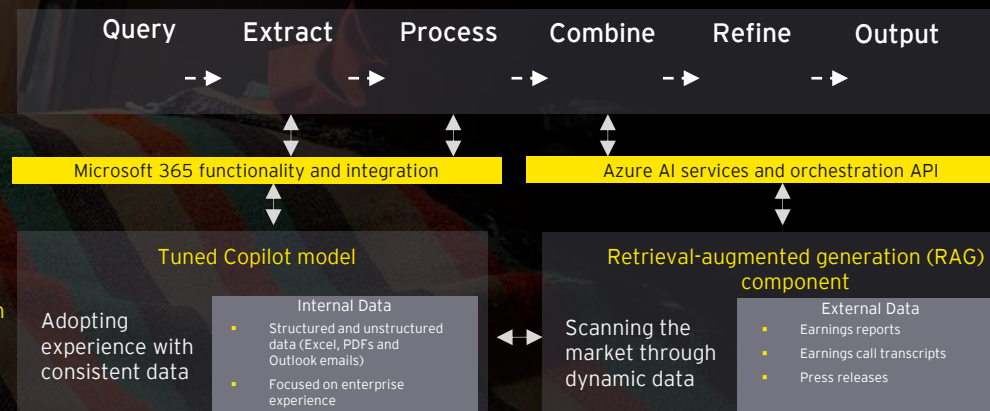
Solution benefits

In a world where corporate processes are being expedited by generative AI (GenAI), fine-tuning focuses on incorporating tenant-specific knowledge in your models.

With AI productivity, organizations can benefit from days or weeks of work in minutes, as well as limited generalist AI results about the industry or tenant. With **Advanced Tuning for Microsoft Copilot**, organizations can benefit from tenant knowledge and experience, with decades or more of understanding customer needs and business landscape:

- Leading practices for writing tone, knowledge and format
- Reasoning on what's important to core business outcomes
- Orchestrating tenant-specific enterprise processes and roles

Illustrating Copilot tuning for selected use case



Solution differentiators

- **Advanced Tuning for Microsoft Copilot** trains tenant-specific models on your organization's data while maintaining robust enterprise security, compliance, governance and management controls. Low-code supervised fine-tuned models are trained with reinforcement learning for specific tasks such as summarization, document generation and professional Q&A.
- Copilot tuning is AI tailored to your business. Improve the accuracy, tone and relevance of Copilot responses by tailoring machine learning based models to reflect an organization's unique terminology, communication style and business processes.

Case study

Advanced Tuning for Microsoft Copilot for tax advisory for the EY organization

Client challenge	Engagement summary	Value provided
▪ The Microsoft product group approached EY teams with a vision to create an “enterprise brain” fine-tuned on domain-specific data-aiming to transform tax advisory research and provide a differentiated offering to clients. ▪ The tax advisory process demands deep domain experience and access to vast knowledge-spanning individuals, enterprise and external sources. The goal is to improve this process and drive efficiency. However, a fine-tuned recipe for this domain area was yet unknown to Microsoft to offer a such a service. ▪ There was an opportunity to incorporate a tenant Copilot-as-a-Service solution with tax domain-specific large language and reasoning models to improve the tax advisory business process. Microsoft formed a recipe for the fine-tuning process, offering the solution and service in partnership with EY teams.	Microsoft technology: ▪ Accelerate time to value ▪ Tenant Copilot-as-a-Service provisioning ▪ Microsoft 365 Enterprise search ▪ Copilot (tax advisor) declarative agent ▪ Tax domain-specific fine-tuned large language model ▪ Tax domain-specific deep reasoning model EY teams services: ▪ Tax advisory professional services ▪ Domain-specific technology consulting ▪ Transformation and change management ▪ AI governance and risk framework	Tuned model performance against Microsoft 365 agents and Copilot Studio RAG agents: ▪ 20% coherence improvement ▪ Tracking comprehensible output structure ▪ 10% readability improvement ▪ In line with business tone and formatting ▪ 17% relevance boost ▪ Concise outputs answering user query ▪ Robust and accurate ▪ Less hallucinations while maintaining breadth of capabilities from Microsoft AI ecosystem

Joint value proposition

- The EY-Microsoft Alliance approach rapidly executes and realizes benefits of custom and agentic Copilot experiences while establishing governance for responsible use of the platforms.
- The global EY organization plays an integral role in helping clients adopt GenAI from a business and technology perspective. EY teams combine leading data natural language processing (NLP) technology with business solutions to meet risk, regulatory and operational needs utilizing its use cases and assets to accelerate solutions.

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