



Microsoft Copilot Studio for Financial Services Industry

Engagement Highlights



Gain visibility to data and content from non-Microsoft solutions



Combat budget and time constraints with our experienced engineers



Establish innovative, AI solutions using Microsoft 365 Copilot, infrastructure



Increase your enterprise's prompting mastery using MDS' business case modules



Leverage existing Python financial packages or international sanctions programs and APIs

Our MDS experienced Microsoft 365 Application Engineers, System Administrators, Business Analysts, Change Management Architects and Data Scientists comprise a group to help your organization advance your Copilot ambitions.

Approach

The Financial Services Industry has continually transformed its services to meet the demand from customers. Gen AI's potential for value creation has seen estimates of its impact reach upwards of \$1 trillion of incremental value for financial institutions, annually.

The Maureen Data Systems' Copilot Studio for Financial Services Industries delivery will build Microsoft 365 Copilot first-party, enhancements that increase the productivity of users in banking, insurance, private equity, government financial supervision, as well as their customers.

With our guidance

Innovate enterprise-relevant conversations for predictable scenarios that require specific responses, such as those for compliance or regulatory topics.

Integrate real-time market data to position insight into action with connectors, plugins or cloud services such as Azure Open AI (i.e. GPT-4o) service, Models as a Service, knowledge bases and foundation models.

Why MDS ?

A Microsoft designated Data & AI, Modern Work and Security partner with an over 30-year, proven track record of delivering solutions and services.



Microsoft 365 Copilot Jumpstart Program Member



See Real World Value

Whether you have just started your enterprise generative AI journey or are further ahead, adopting a transformative solution platform requires planning, vision, risk analysis and many other critical considerations to enterprise line of business systems, productivity utilities and relevant business processes.

Our experienced team of Microsoft 365 applications engineers will help you realize actionable Copilot advances for your enterprise day to day use.

Engagement Goals

Empower your enterprise with AI productivity and skilling. Ready crucial content processes and sources for optimal Copilot experiences.

Note: Microsoft 365 Copilot Studio for Financial Services Industry engagement may have funding available for eligible customers. Please contact MDS to validate eligibility.

What to expect

Our MDS Four-Week Copilot Studio for Financial Services engagement is a hands-on, intensive Microsoft 365 Copilot, first-party extensibility effort.

This includes four milestones across a full, MDS end-to-end Microsoft 365 Copilot delivery to enhance your organization's Copilot experience using Microsoft's Copilot Studio.

At engagement's end, MDS will have led your business stakeholders to validate your Copilot data or service integration business case.

What You Get

Assess your Microsoft 365 Copilot land scape and alignment then establish a cadence to deliver this engagement.

Enable your key organizational personas to leverage Copilot for the way you do business and utilize for day-to-day tasks and activities.

Establish a deployment and adoption strategy that fits your enterprise and tune your new AI powered practices to your own operations.

Validate functional, technical or role-based business scenarios to ensure enterprise success for Copilot user enablement !

Realize
Value

Engagement