

AI-Powered Client Servicing Transformation

Training Duration

- 24 hours (3 Days)

Training Objective

- This program is designed to help client servicing teams in organizations understand and adopt AI-powered workflows using Microsoft AI technologies.
- The training focuses on:
 - Improving customer response efficiency
 - Reducing repetitive servicing workload
 - Enhancing coordination across departments
 - Building AI-powered assistants and agents
 - Understanding Agentic AI concepts in enterprise environments

DAY 1 – AI Foundations & Microsoft 365 Copilot

Module 1 - AI Foundations

- Evolution of AI in business
- Generative AI fundamentals
- What are AI agents?
- AI Chatbots vs AI Assistants vs AI Agents
- Agentic AI fundamentals
- Human-in-the-loop systems

Module 2 - AI Concepts for Client Servicing

- Why AI matters in client servicing
- Traditional automation vs AI-powered automation
- Understanding Large Language Models (LLMs)
- Knowledge Grounding & Retrieval Concepts (RAG Overview)

Module 3 – Microsoft 365 Copilot

- Outlook Copilot
 - Drafting customer responses
 - Email summarization

- Follow-up generation
- Escalation communication
- Teams Copilot
 - Meeting summaries
 - Action item extraction
 - Coordination across departments

Module 4 – Copilot Agents in Microsoft 365

- What are Copilot agents?
- Agent Builder overview
- When to use Agent Builder vs Copilot Studio
- Quick agent creation demo

DAY 2 – Microsoft Copilot Studio Fundamentals

Module 5 – Introduction to Copilot Studio

- Copilot Studio architecture
- Agent lifecycle
- Topics
- Knowledge
- Actions
- Channels
- Analytics

Module 6 – Building Your First Agent

- Lab: Create an agent using Copilot Studio
- Agent creation
- Conversational builder
- Agent configuration
- Testing
- Publishing
- Business-Specific Demonstration: Mapping Copilot Studio concepts to servicing operations

Module 7 – Generative AI & Knowledge Sources

- Generative Answers
- Grounding AI responses
- Enterprise knowledge
- Website knowledge sources
- SharePoint knowledge sources

- File-based knowledge sources
- Lab: Configure Generative Answers
- Lab: Add knowledge sources
- Business-Specific Demonstration: Customer FAQ assistance

Module 8 – Topics & Conversation Design

- Trigger phrases
- Topic creation
- Conversation paths
- Branching
- Fallback topics
- System topics
- Lab: Create and manage topics
- Business-Specific Demonstration: Shipment escalation routing

DAY 3 – Advanced Agent Development & Enterprise Deployment

Module 9 – Entities & Variables

- Built-in entities
- Custom entities
- Variables
- Session memory
- Cross-topic variables
- Lab: Capture shipment information
- Business-Specific Demonstration: Build customer-specific servicing responses

Module 10 – Enhancing Agents

- Analytics
- Agent performance monitoring
- Conversation history
- Testing and debugging
- Agent optimization
- Lab: Analyze and improve responses
- Business-Specific Demonstration: Improving servicing response quality

Module 11 — AI Governance, Security & Responsible AI

- Responsible AI usage
- Enterprise AI governance

- Data privacy considerations
- Security in enterprise AI tools

Understanding AI Risks

- Hallucinations
- Incorrect recommendations
- Prompt injection risks
- Data leakage concerns

Module 12 – Publishing & Deployment

- Teams deployment
- Security considerations
- User access
- Governance overview
- Lifecycle management
- Lab: Publish agent to Teams