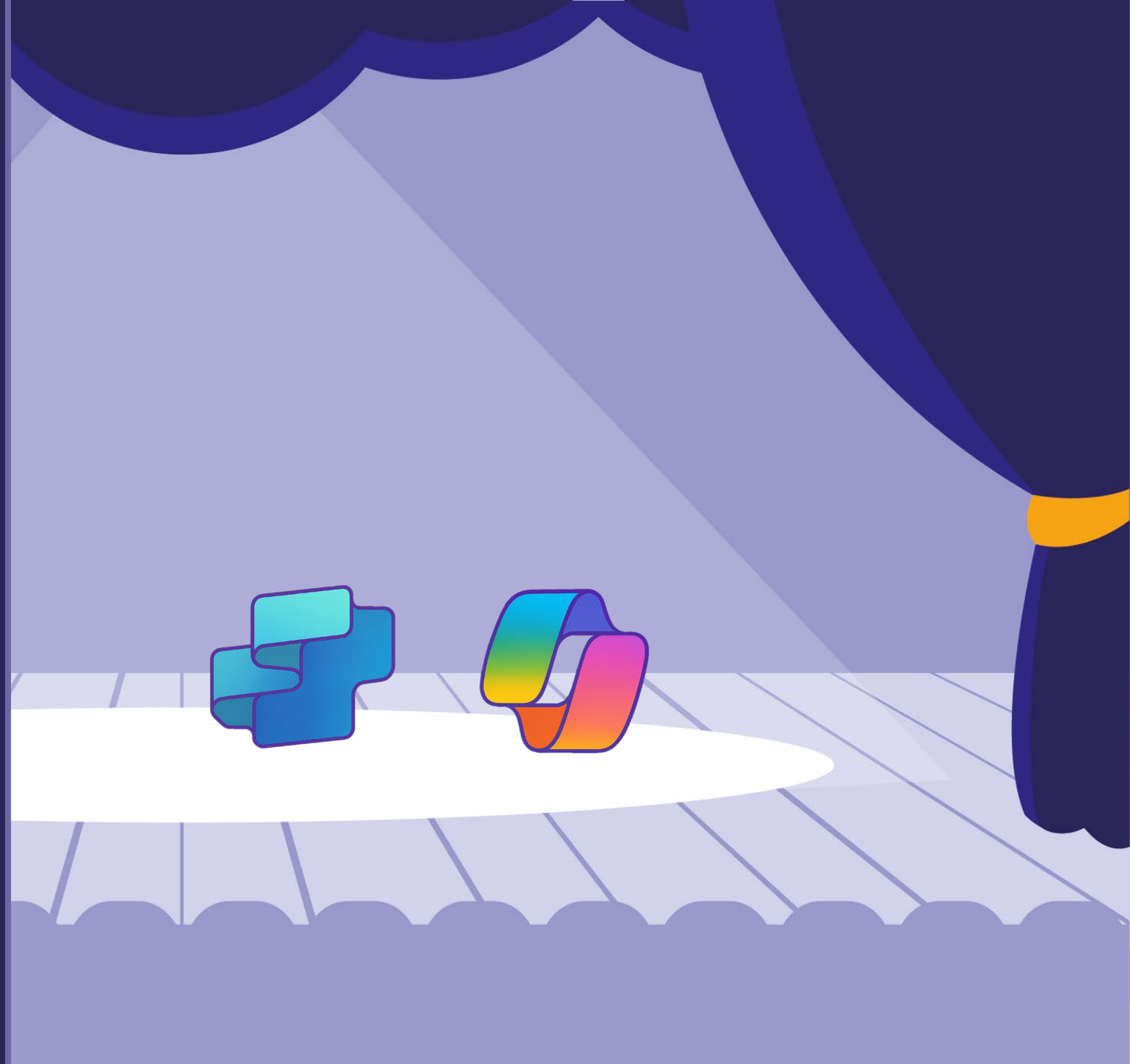
From Prep to Performance:

Your Backstage Pass to Copilot Success



Smartbridge

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Today’s Landscape

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The Curtain Rises on a New Era of Work

Every industry is preparing for the big performance where productivity, speed, and intelligence take center stage. The pressure is on to deliver more personalized experiences, faster insights, and higher efficiency.

This is where **Microsoft Copilot** enters the picture.

Copilot helps bridge the gap between your data and your daily decisions. Seamlessly integrated into the tools your team already uses (like Power BI, Excel, Teams, and Dynamics), Copilot helps streamline tasks, write content, uncover insights, and automate decisions. It doesn't just answer questions. It transforms how work gets done.

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Taking advantage of generative AI streamlines productivity, improves quality of outputs, and increases value creation

Streamline productivity

Applying generative AI to a range of marketing tasks will result in an estimated **productivity increase of more than 40%** by 2029

Improve quality of outputs

75% of analytics content will use generative AI for **enhanced contextual intelligence** by 2027

Increase value creation

Current generative AI technologies could **automate work activities that absorb 60-70% of employees' time**

IDC: IDC Estimates that GenAI Will Increase Marketing Productivity More Than 40% by 2029, April, 2024

Gartner Predicts 75% of Analytics Content to Use GenAI for Enhanced Contextual Intelligence by 2027

McKinsey: The Economic Potential of Generative AI: The Next Productivity Frontier, June 2023

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Current barriers to AI readiness and adoption

- What data do I have and is it accessible?
- Budget and time constraints
- Integration with business systems
- Product/technical onboarding
- Security and compliance risks
- Infrastructure/resource hosting



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What is Copilot & Copilot Studio?

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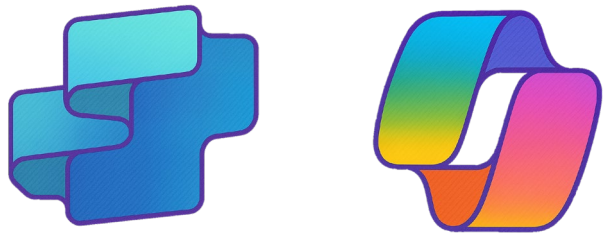
Meet the Stars Behind the Magic

Microsoft Copilot is a generative AI assistant that's embedded directly into the tools your teams already use every day, like Microsoft 365, Dynamics, Power Platform, and Azure. It brings real-time intelligence, automation, and data-driven decision-making to the forefront of work.

Copilot Studio, on the other hand, is a low-code platform that allows organizations to create, customize, and manage their own Copilots tailored to your unique business needs, systems, and workflows.

Whether you're building from scratch or modifying an existing Copilot, Microsoft Copilot Studio gives you full control to align AI behavior with your organization's data, processes, and policies.

The real showstopper? It's all backed by Microsoft's security, scalability, and integration with the Microsoft 365 suite your team already knows.



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Is Copilot just a chatbot? Well… not really.

Conversational AI

Chatbot

Conversational experience using trained NLU models

Common to be text based	Data queried with APIs vs grounding	Prebuilt content and topics by makers	Embedded into sites, but siloed	Context holding

Copilot

Evolution of chatbots as conversational assistants powered by large language models and generative AI to assist in your line of work.

Natural, multimodal interface	Grounding in multiple data sources	Generative content capabilities	Contextual interactions	Responsiveness and adaptability
Enables more than just text formats.	Works with your internal and external data sources	Generative AI powering Copilot building and response generation	Connected to the app experience it lays	Flexible to configure to context of experience.

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Customizing Copilot

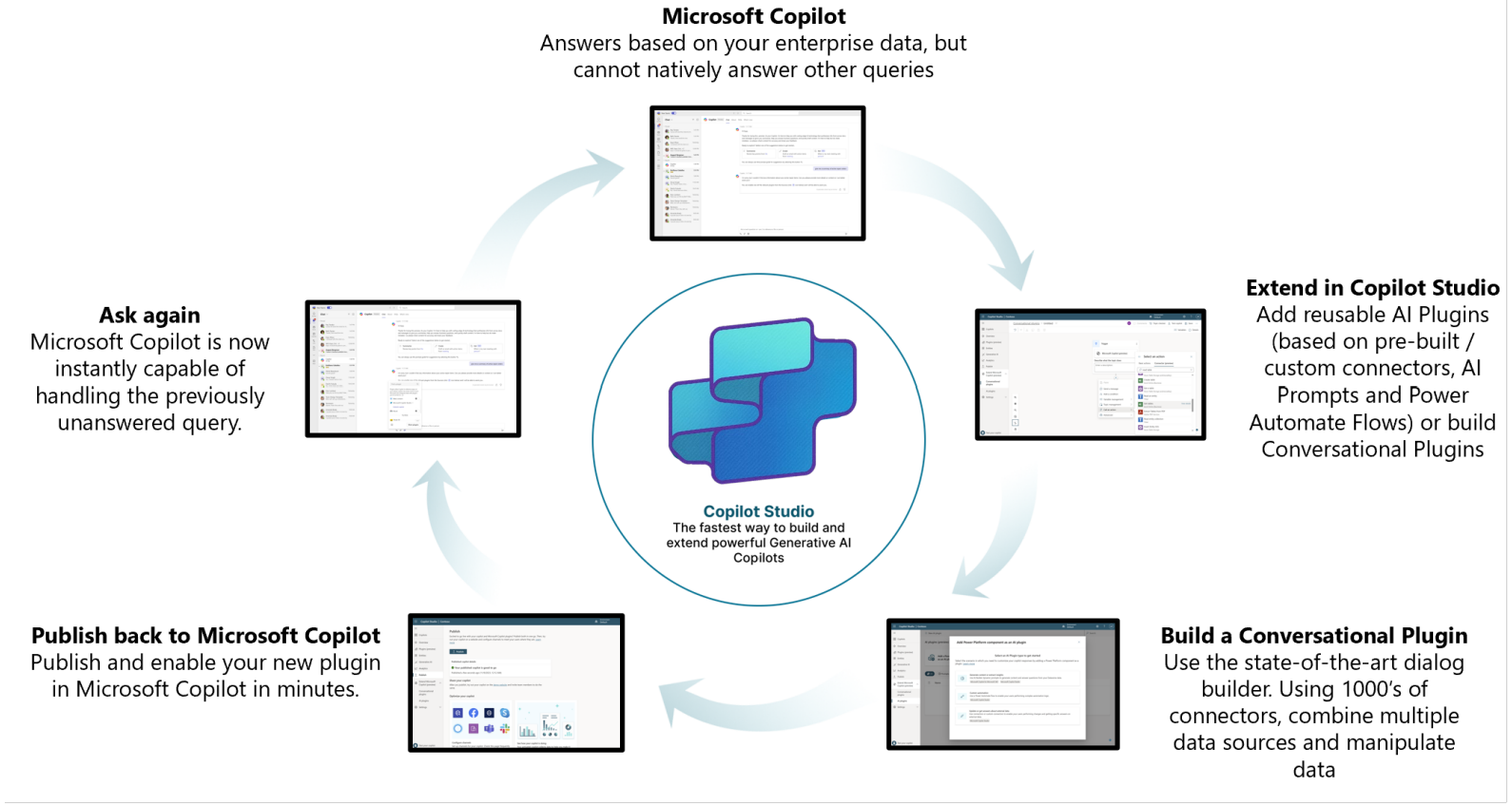
Microsoft Copilot can be great out-of-the-box, but the real magic shines when you customize it with tools like Copilot Studio and Azure OpenAI!

Copilots can be tailored to fit whatever need your organization might have whether that be industry-specific use cases or just better executive insights (we'll get into more of those later).

For now, here's a quick example of how a Copilot can be customized.

SPOTLIGHT: COPILOT ARTICLES

View our extensive library of copilot articles, use cases, and case studies at smartbridge.com/ai/insights



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AI Readiness and Your Data Foundation

Featuring Microsoft Fabric

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Setting the Stage

Before the spotlight ever hits the stage, months of prep happen backstage like lighting rigs, sound checks, rehearsals. Implementing Copilot is no different. Without the right data foundation, your Copilot won't have the material it needs to perform.

Microsoft Fabric is your backstage crew. It unifies data from every corner of your organization into a secure, governed, and ready-to-perform platform.

No matter if your data is stored on-prem, in the cloud, or across multiple systems, Fabric brings it all together so your AI assistant can shine.

With Fabric, you:

- Eliminate data silos and duplicates
- Create a single source of truth for insights
- Enable real-time access for analytics and AI
- Power Copilot with clean, connected, governed data

When the data is ready, the show can begin.

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Fuel your journey to AI innovation by getting your data AI ready with Smartbridge

Hybrid infrastructure

1

Unify your on-prem and cloud-based data sources on an open and governed lakehouse foundation

End-to-end data and analytics platform

2

Establish a real-time connection to your data and leverage seamless integration with end-to-end, out-of-the-box analytics tools

Unified AI Platform

3

Accelerate machine learning projects and build custom, generative AI experiences on top of your data

Intelligent solutions

4

Build an interactive app that can process natural language as input/output, with data-driven personalized experience

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Microsoft Fabric: The data platform for the era of AI

Unify your analytics on a complete, governed platform

Give your data teams all the tools they need in a unified, governed, and secure experience that reduces the cost and effort of integration.

Empower every business user

Empower everyone to uncover insights with the data they need, easy-to-use tools, and visuals embedded in the Microsoft 365 apps they use everyday.

Establish a trusted data foundation

Integrate data from anywhere into a single, multi-cloud data lake for the entire organization and work from the same copy of data across analytics engines.

Fuel your AI innovation

Adopt a data platform that's infused with AI at every layer to help you get more done, faster.

SPOTLIGHT: AI READINESS AND FABRIC

View extensive AI Readiness and Fabric resources at smartbridge.com/microsoft-ai-partner



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Enhance Power BI and other tools with Copilot

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Lights, Dashboards, Action!

Power BI is already a strong visual performer, but when Copilot joins the scene, it becomes an intelligent narrator. With natural language prompts, Copilot helps business users generate visuals, write summaries, and ask questions without touching a formula or SQL query.

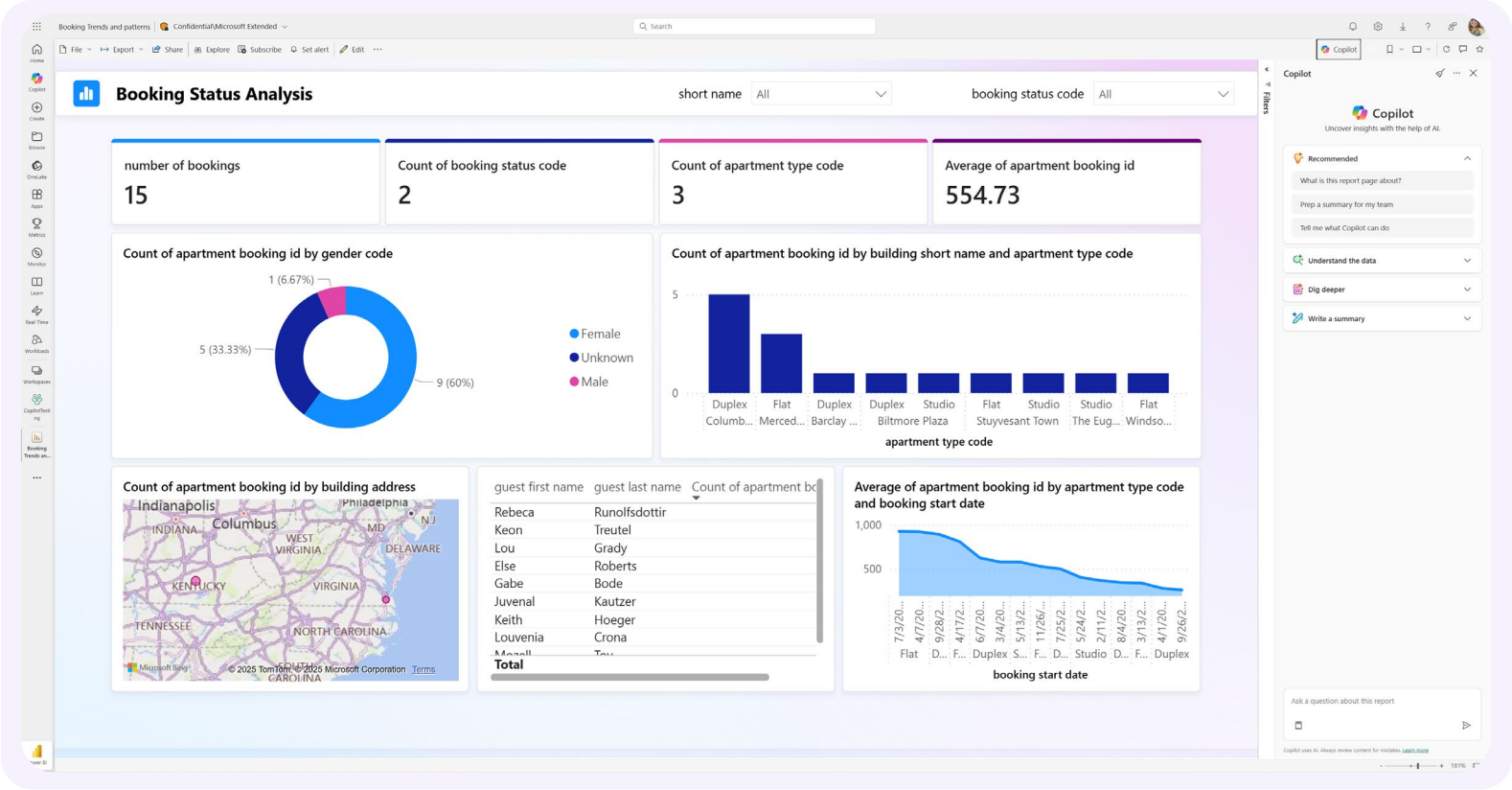
From “What were last quarter’s top-performing products?” to “Explain the dip in customer retention,” Copilot brings your data story to life instantly.

But the magic doesn’t stop at Power BI. Copilot enhances tools like Excel, Teams, Outlook, and more by automating tasks, generating content, and surfacing insights across every scene of your daily work. Copilot doesn’t just report on data, it helps you act on it, speeding up decision cycles and reducing friction across departments.

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SPOTLIGHT: COPILOT FOR POWER BI

View our insights on Copilot for Power BI:
smartbridge.com/copilot-for-power-bi



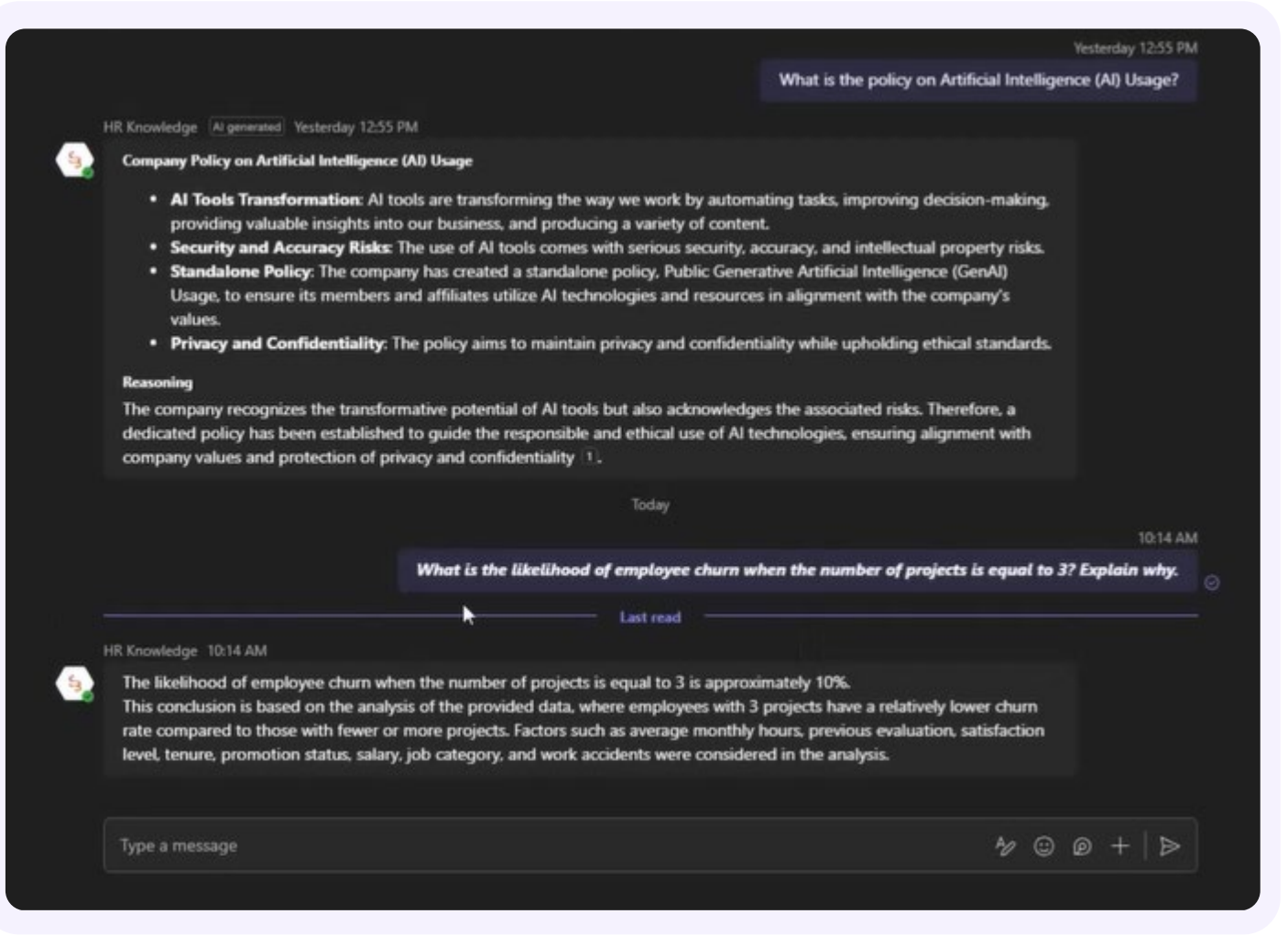
Copilot + Power BI

Copilot transforms datasets into clear, actionable insights, making it accessible not just for analysts, but for anyone who needs to make informed decisions. Instead of spending hours on manual analysis and formatting, Copilot delivers insights in seconds. It not only interprets your data but also presents it in a refined, presentation-ready format which saves time and elevates your message.

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Copilot + Teams Example

Copilot Studio enables organizations to build custom Copilots configured to their internal needs directly within Microsoft Teams. At Smartbridge, we created a Copilot powered by our HR handbook, allowing employees to ask questions about company policies, benefits, or procedures in a natural, conversational way. Instead of searching through documents or emails, team members can get instant, accurate answers within the tools they already use every day.



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Custom Copilots

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Tailored for Every Role

Not every performance uses the same script. That's why Smartbridge helps you design custom Copilots that fit your industry, your workflows, and your audience. Here are a couple examples of the types of custom copilots we help create:

Industry-Specific Copilots: Imagine a Copilot trained for oilfield safety checks, restaurant workforce scheduling, or regulatory documentation reviews. These copilots speak the language of your business and know exactly how to support each backstage role. With custom prompts, connected systems, and a focused knowledge base, these copilots reduce ramp-up time and improve task accuracy.

Executive Insights Copilots: Designed for leadership, custom executive insight copilots synthesize complex data and deliver show-ready insights on demand. Want to know why operational margins dipped in Q2? Just ask. These copilots surface trends, exceptions, and even suggested actions without you needing to click through five dashboards.

Custom Copilots are where innovation meets precision and Smartbridge helps you get there with governance, testing, and ongoing support baked in.

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Industry-Specific Copilot Example – Energy

Smartbridge's AI-Driven Workforce & Equipment Optimization Solution Revolutionizes Oilfield Operations by Reducing Downtime, Improving Efficiency, and Maximizing Profitability



Real Time Scheduling Decisions

AI driven conversational based assistants enable quick, informed decisions based on availability, demand and current backlog. No more dependency on canned reports.

Digital Transformation

Modernizes workforce and equipment scheduling, shifting organizations from manual processes to intelligent conversational based process.

Forecasting & Predictive Planning

AI can suggest future staffing and equipment needs based on historical patterns and project pipeline

Workforce Productivity

AI-based scheduling enhances workforce productivity by ensuring the right crews are deployed at the right time to the right job reducing downtime.

Interactive What-If Analysis

Explore scenarios in real time with interactive what-if analysis to make confident, data-driven operational decisions

Seamless Integration

Leverages Microsoft Copilot for intuitive AI-powered interactions across enterprise tools and data repositories.

Enhanced Profitability

By improving efficiency, reducing idle time, and maximizing asset usage, AI-based scheduling directly contributes to higher margins and ROI

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Industry-Specific Copilot Example – Life Sciences & Medical Devices

Smartbridge's Quality AI Agent delivers a smarter, faster approach to audit, compliance, and training—enhancing quality management through AI-powered assistance

Conversational Quality Lookup

Enable real-time access to SOPs and compliance documents through a natural language interface, helping cleanroom staff and auditors quickly find the right answers without interrupting operations.

Embedded On-the-Job Assistant

Support just-in-time learning by providing contextual, in-the-moment answers to workforce questions, supplementing formal training programs and improving SOP adherence.

Secure & Compliant by Design

Maintain data integrity and compliance by accessing quality systems in-place, with no data movement or storage, aligning with regulatory and IT security standards.



Unified Quality Record Retrieval

Accelerate audit prep and investigation processes by surfacing linked records from EDMS, complaints, and tracking systems—all through a single query interface.

Mobile-First Accessibility

Empower frontline teams with instant access to audit and training support from mobile devices, eliminating the need for desktop access in controlled environments.

Trusted, Grounded AI Responses

Deliver accurate and reliable answers by grounding the AI strictly in internal systems and documents, eliminating risks of hallucinations or biased outputs from external data.

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Executive Insights Copilot Example

Smartbridge's solution provides valuable key features for organizations looking to optimize their capital expenditure (CAPEX) allocation and tracking

Enhancing Decision-Making

AI-driven insights enable faster, more accurate capital expenditure (CAPEX) related decisions, ensuring optimal budget allocation, resource planning and tracking.

Operational Efficiency

Reduces time spent on manual CAPEX allocation and tracking processes, allowing teams to focus on strategic initiatives instead of data retrieval and validation

Data-Driven Insights

Aggregates structured and unstructured data sources to provide real-time, context-rich responses for financial planning.



Seamless Integration

Leverages Microsoft Copilot for intuitive AI-powered interactions across enterprise tools and data repositories.

Proactive Issue Resolution

Detects anomalies and inefficiencies in CAPEX-related requests, ensuring compliance and improving financial oversight.

Faster Information Access

Retrieves key CAPEX-related details instantly, reducing delays caused by fragmented systems and manual queries.

Customized CAPEX Analysis

Ensures stakeholders get real-time, actionable insights into thousands of capital projects.

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Governance and Change Management

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Keep the Show Running Smoothly

Even the best productions need stage managers, cue sheets, and house rules. Rolling out AI requires thoughtful governance and change management to ensure long-term success. Without strong governance and change management, even the most promising Copilot initiative can stall.

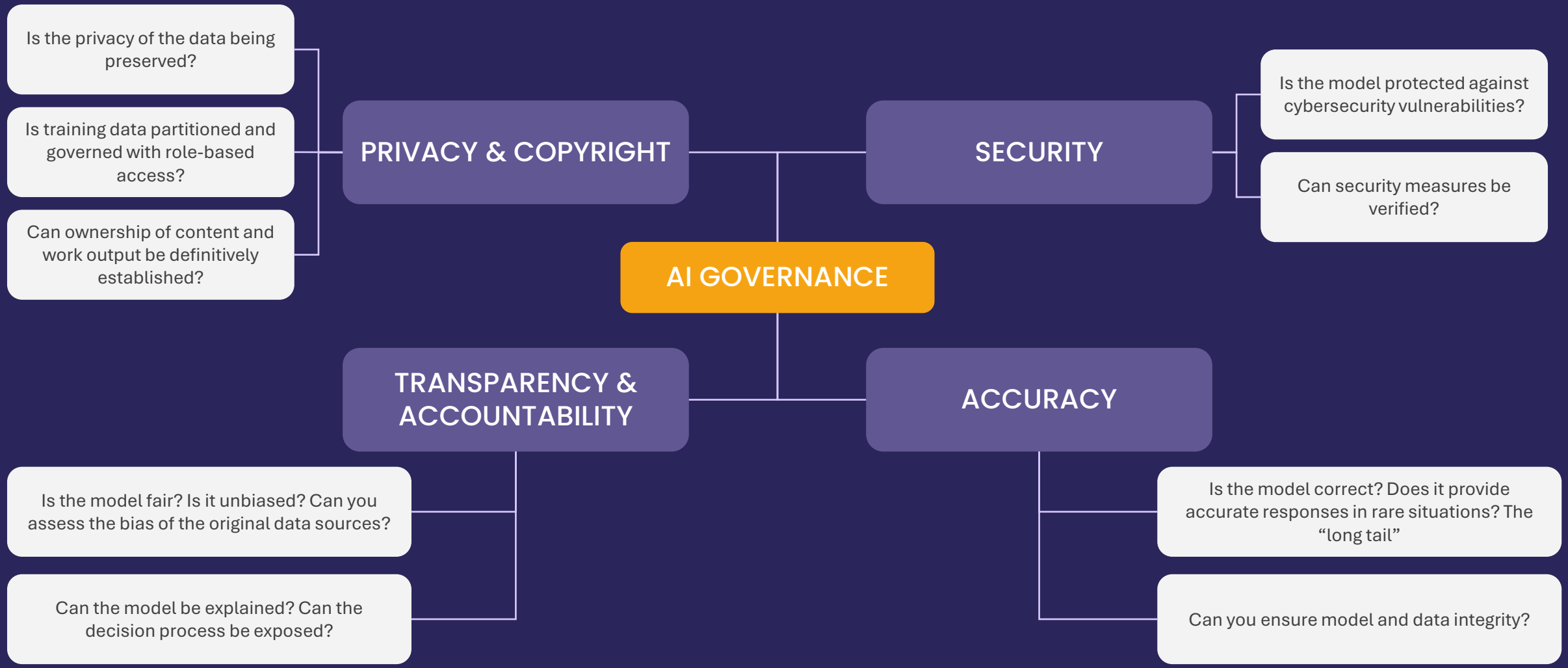
Smartbridge supports you through:

- **Data governance:** Ensuring the right people have access to the right data, with appropriate controls and protections in place.
- **Prompt and model governance:** Establishing guidelines for how Copilots behave, what they're allowed to access, and how they interact with users.
- **Change management:** Helping your teams understand what Copilot is, how it helps, and how their roles may evolve. This includes training, pilot programs, communications plans, and feedback loops.

Governance and change management aren't add-ons, they're foundational. With the right strategy in place, your organization can confidently scale AI, not just experiment with it. Because when everything runs smoothly backstage, the magic on stage feels effortless.

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Even AI needs ethical guardrails around it and should be used responsibly



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Getting Started: Your AI Action Plan

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Implementing AI within an organization requires careful planning and execution. A comprehensive framework will help ensure success over time.

In order to meet your desired business outcomes and realize the true value of your AI implementation, it's important to consider everything that is laid out below. You wouldn't put on a show without knowing if the lights even worked or if your security is going to show up, right? Implementing AI *successfully* involves a lot of preparation, but the result is always worth it!

Strategy: Ensure AI solutions genuinely benefit the end-users (the individuals and communities your organization serves)

People	Process	Technology	Data	Business	Governance
Skill Development & Training	Exploration of Use Cases	AI Cloud Infrastructure, Scalability & Security	Data Collection, Preparation & Management	Define AI Strategy	Compliance & Transparency
Educate Leadership and Stakeholders	Establish Feedback Loop	Model Development, Monitoring & Maintenance	Data Privacy and Security	Define Success Metrics	Risk Management
Build a Cross-Functional Team	User Training and Onboarding	Integration with Existing Systems	Data Bias Mitigation	Establish a Center of Excellence	Policies

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Ready to Get Production Rolling on Your Next Copilot Project?

Have your people call our people

713-360-2500

smartbridge.com

Book directly on our calendar!
https://calendly.com/smartbridgemeeting/ai-services

Microsoft Solutions Partner
Data & AI
Azure

Specialist
Data Warehouse Migration
Analytics

Microsoft Solutions Partner
Digital & App Innovation
Azure



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