

# Transforming Banking Workflows with Brillio's M365 Copilot Solutions

Brillio's M365 Copilot solutions empower banking professionals to streamline complex workflows and manage data-heavy tasks with clarity and speed. Fully integrated into the trusted Microsoft M365 suite—including Outlook, Teams, Excel, Word, and PowerPoint—Copilot transforms how teams draft reports, uncover insights, and respond to critical queries.

For the banking sector, this translates to sharper decision-making, measurable productivity gains, and more agile operations. From automating compliance processes to crafting persuasive client proposals and identifying actionable trends in real-time, M365 Copilot turns routine tasks into strategic opportunities, driving growth and delivering exceptional customer value.

## Brillio's Copilot M365 Capabilities

### Copilot Enterprise Enablement:

Brillio ensures a seamless transition to M365 Copilot for banking organizations by addressing every step of the adoption journey. From strategy development to change management, we align Copilot's deployment with the unique demands of the financial sector, ensuring compliance, security, and tangible business value.

- **Copilot Strategy:** Develop a roadmap tailored to banking goals, including enhanced customer engagement, operational efficiency, and compliance readiness, ensuring a clear path for Copilot adoption.
- **Copilot Evangelization:** Build organizational awareness and excitement, showcasing how Copilot transforms workflows and enhances productivity.
- **Readiness Assessment:** Assess existing infrastructure, data pipelines, and workforce

capabilities to identify opportunities for optimizing banking workflows.

- **Pilot Design and Execution:** Define, launch targeted pilots to validate use cases, gather feedback, and refine deployment strategies.
- **Copilot Deployment Strategy:** Deploy Copilot at scale across banking functions with custom configurations to meet the needs of relationship managers, compliance officers, and operations teams.
- **User Training:** Provide role-specific training to empower employees in handling data, creating presentations, or drafting client proposals with precision.
- **Infrastructure Setup:** Ensure secure integration with existing banking systems, complying with financial regulations like GDPR, PCI DSS, and others.
- **Value Measurement:** Leverage data-driven tools to monitor adoption, measure productivity improvements, and quantify time savings across banking operations.
- **Governance Framework:** Implement a governance model to maintain compliance, ethical AI use, and robust data security standards critical to the banking industry.
- **Change Management:** Drive user adoption by engaging stakeholders, communicating benefits clearly, and easing transitions for staff in customer-facing, operational, and back-office roles.

### Tailored Agent Services for Banking:

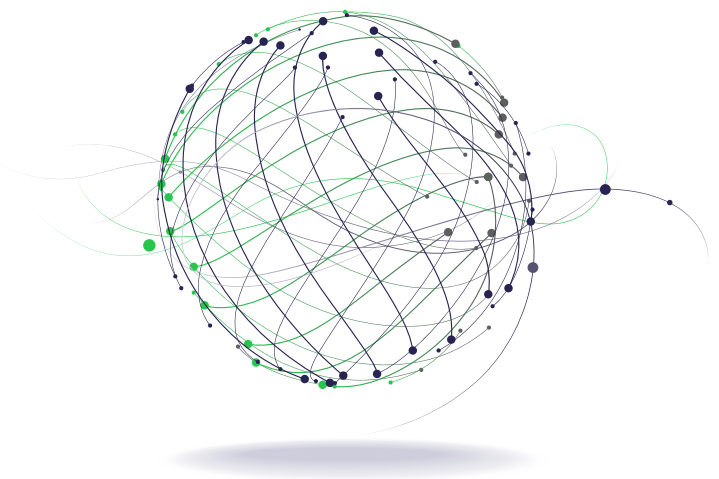
Brillio's Copilot Enterprise Agent Services empower banks to design and implement intelligent solutions that optimize workflows, enhance decision-making, and deliver impactful results.

- **Design Thinking-Led Discovery Workshop:** Uncover high-impact opportunities in areas like customer onboarding, loan processing, fraud detection, and compliance. Map workflows to prioritize use cases that drive measurable outcomes.
- **Advanced Use Case Solutioning:** Develop scalable AI-driven solutions to address complex challenges, such as regulatory reporting, credit risk analysis, and personalized client advisory services.
- **Copilot Agent Development:** Build custom Copilot Agents tailored to banking roles and functions, providing actionable insights and support to relationship managers, compliance officers, and operations teams.
- **Workflow Automation:** Streamline repetitive tasks, such as transaction reconciliations, customer service responses, and data entry, to enhance efficiency and reduce operational bottlenecks.
- **Performance Optimization:** Continuously improve Copilot Agents using real-time feedback and analytics, ensuring they remain accurate, relevant, and impactful in dynamic banking environments.
- **Custom Integration & Deployment:** Seamlessly integrate Copilot Agents with core banking systems, CRM platforms, and data ecosystems, ensuring minimal disruption and maximum operational utility.
- **Change Management:** Facilitate the adoption of Copilot Agents across banking teams through structured change management, role-specific training, and ongoing communication strategies.

## What You Gain?

Brillio's M365 Copilot solutions revolutionize banking operations by simplifying meeting management, enhancing client interactions, and improving collaboration across teams. It supports training, streamlines task management, and equips professionals with advanced tools for document analysis, financial reporting, and research. Copilot also enhances technical support and content refinement, ensuring accuracy and quality across deliverables.

- **Accelerated Productivity:** Automate routine tasks like transaction reconciliations, compliance reporting, and client follow-ups, freeing up valuable time for strategic initiatives.
- **Actionable Insights:** Simplify complex financial data into clear recommendations to drive key decisions in areas like credit risk, portfolio management, and market trends.
- **Enhanced Collaboration:** Foster seamless cross-department teamwork with AI-driven tools integrated into platforms like Teams and Outlook.
- **Functional Value Capture:** Go beyond M365 with customized Copilot Agents designed for critical banking functions.



# Unlocking Efficiency with Brillio's Accelerators

Brillio's accelerators help banking organizations unlock the full potential of M365 Copilot with tools like a curated Use Case Library, Persona Playbooks, and the Agent Solution Blueprint. These frameworks streamline implementation, enhance user engagement, and ensure measurable outcomes. With insights from AI-Enabled Survey Analytics and Org Maturity Mapping, combined with a Value Measurement Framework, Brillio ensures seamless integration, compliance, and strategic alignment.

## Real-World Use Cases

### Breaking Data Silos: Revolutionizing Information Retrieval with Copilot:

A leading global organization faced delays and inefficiencies in retrieving insights due to siloed data systems, leading to fragmented workflows.

#### Our Solution

Brillio developed a unified search platform powered by M365 Copilot, integrating disparate content sources into a cohesive interface. Leveraging advanced semantic algorithms, the solution provided precise, contextually relevant results tailored to roles like risk analysts and relationship managers. Intuitive features like autocomplete, smart suggestions, and content previews enhanced usability and efficiency.

#### Impact

- Achieved ~15% productivity increase through faster information retrieval.
- Improved user experience, boosting employee satisfaction and streamlining workflows.

### Streamlining Banking Operations with Copilot Enablement:

A leading BFSI company sought to enhance productivity by integrating Copilot into Word and Excel while identifying use cases in treasury operations, customer service, and credit & funding.

#### Our Solution

Brillio delivered a tailored enablement program that included customized training sessions, workshops to identify high-impact use cases, and a value measurement framework to track ROI. An AI governance framework ensured compliance and ethical use, promoting sustainable adoption.

#### Impact

- Achieved ~95% adoption across 300 Copilot licenses.
- Developed a comprehensive use case and prompt library.
- Measured and highlighted individual productivity improvements, reinforcing program success.



## ABOUT BRILLIO

Brillio is one of the fastest growing digital technology service providers and the partner of choice for many Fortune 1000 companies seeking to turn disruptions into competitive advantages through innovative digital adoption. We help clients harness the transformative potential of the four superpowers of technology: cloud computing, Internet of Things (IoT), artificial intelligence (AI) and mobility. Born digital in 2014, we apply our expertise in customer experience solutions, data analytics and AI, digital infrastructure and security, and platform and product engineering to help clients quickly innovate for growth, create digital products, build service platforms, and drive smarter, data-driven performance. With 17 locations across the US, the UK, Romania, Canada, Mexico, and India, our growing global workforce of 7,000 Brillians blends the latest technology and design thinking with digital fluency to solve complex business problems and drive competitive differentiation for our clients. Brillio was certified by Great Place to Work® in 2021, 2022, 2023, and 2024.



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