

Copilot Studio for Customized Client Engagement

Executive summary



Problem Statement

In online customer service, Generative AI has transformed expectations. Traditional Chat abandonment rates are likely to increase, as consumers expect experiences like those available with services like ChatGPT and Microsoft Copilot.



Solution Developed

- Our custom copilot for Insurance enables generative AI to respond to initial inquiries.
- An agent is only engaged when confidence in response is below 70%.



Technology Used

- A Copilot Studio developed for the Insurance Industry
- Microsoft Teams
- SharePoint Online



Business Benefits

Insurers need to meet customers where they are, customizing experiences that improve automation and ultimately drive better customer satisfaction and reduced cost for the insurer.

Problem statement | Business context



Efficiency Boost

- Copilot reduces search time, enabling agents to swiftly address inquiries.
- Faster responses mean happier clients.

Consistent Knowledge Base

- Copilot ensures uniform answers across the team.
- No more accidental llama grooming advice during auto policy discussions.

First Call/Chat Resolution (FCR) Uplift

- Copilot assists agents during calls, improving FCR rates.
- Fewer callbacks, more satisfied customers.

Training Acceleration

- New agents onboard faster with Copilot as their digital mentor.
- Less training, more problem-solving.

Cost-Effective Harmony

- Copilot trims operational costs.
- It's like finding a hidden treasure in the virtual office.

Solution developed

Centralized Knowledge Base: Integrates with SharePoint Online to access and update a centralized repository of policy documents, FAQs, and customer information, ensuring accurate and up-to-date responses.

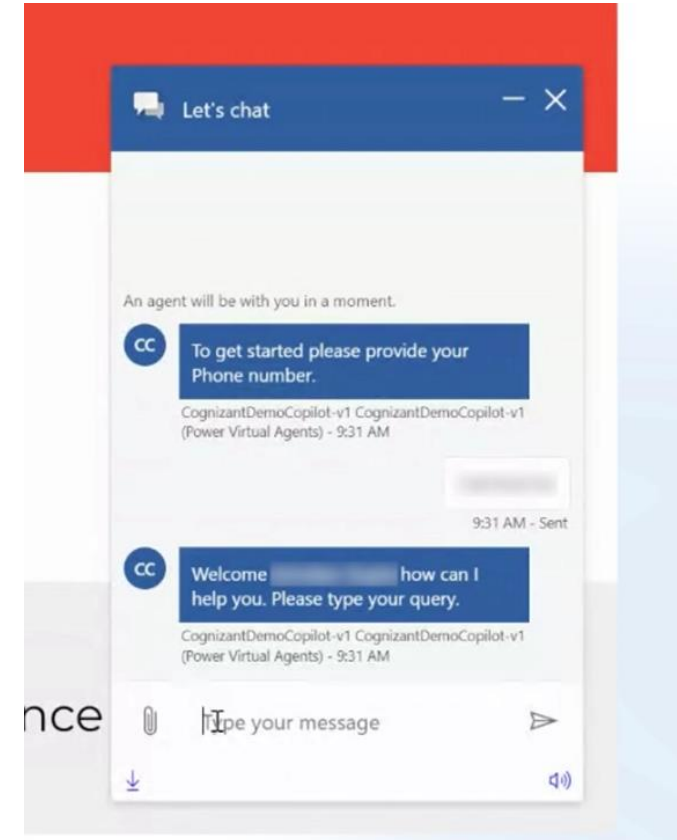
Seamless Communication: Utilizes Microsoft Teams for real-time collaboration between customer service agents and other departments, enabling quick resolution of complex queries.

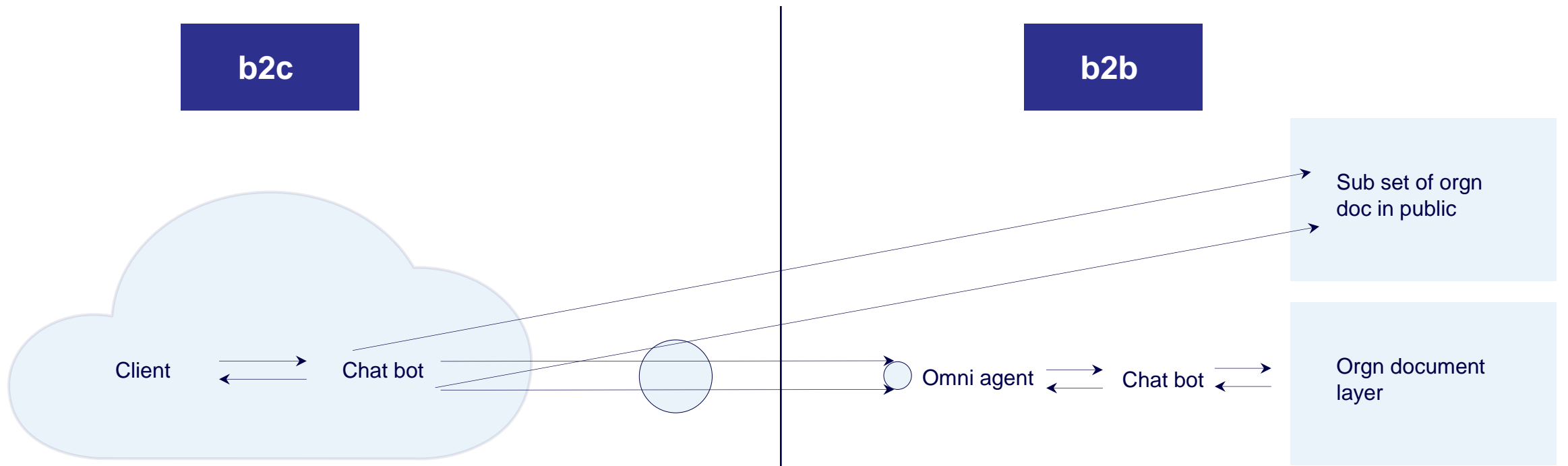
AI-Powered Assistance: Employs generative AI to provide instant, personalized responses to customer inquiries, reducing wait times and enhancing customer satisfaction.

Automated Workflows: Automates routine tasks such as policy renewals, claim status updates, and appointment scheduling, freeing up human agents for more critical tasks.

Data-Driven Insights: Analyzes chat interactions to identify common issues and trends, providing actionable insights to improve service quality and operational efficiency.

Secure and Compliant: Ensures all interactions and data handling comply with industry regulations and company policies, maintaining customer trust and data security.





1. Customer initiates chat on website
2. Custom Copilot responds with answers found on data source(website).
3. When Copilot cannot answer with confidence, a human is engaged via alert in omnichannel
4. Copilot summarizes interaction
5. Copilot aids in answer
6. Agent delivers Copilot generated response

Demo

Key capabilities (1/4)

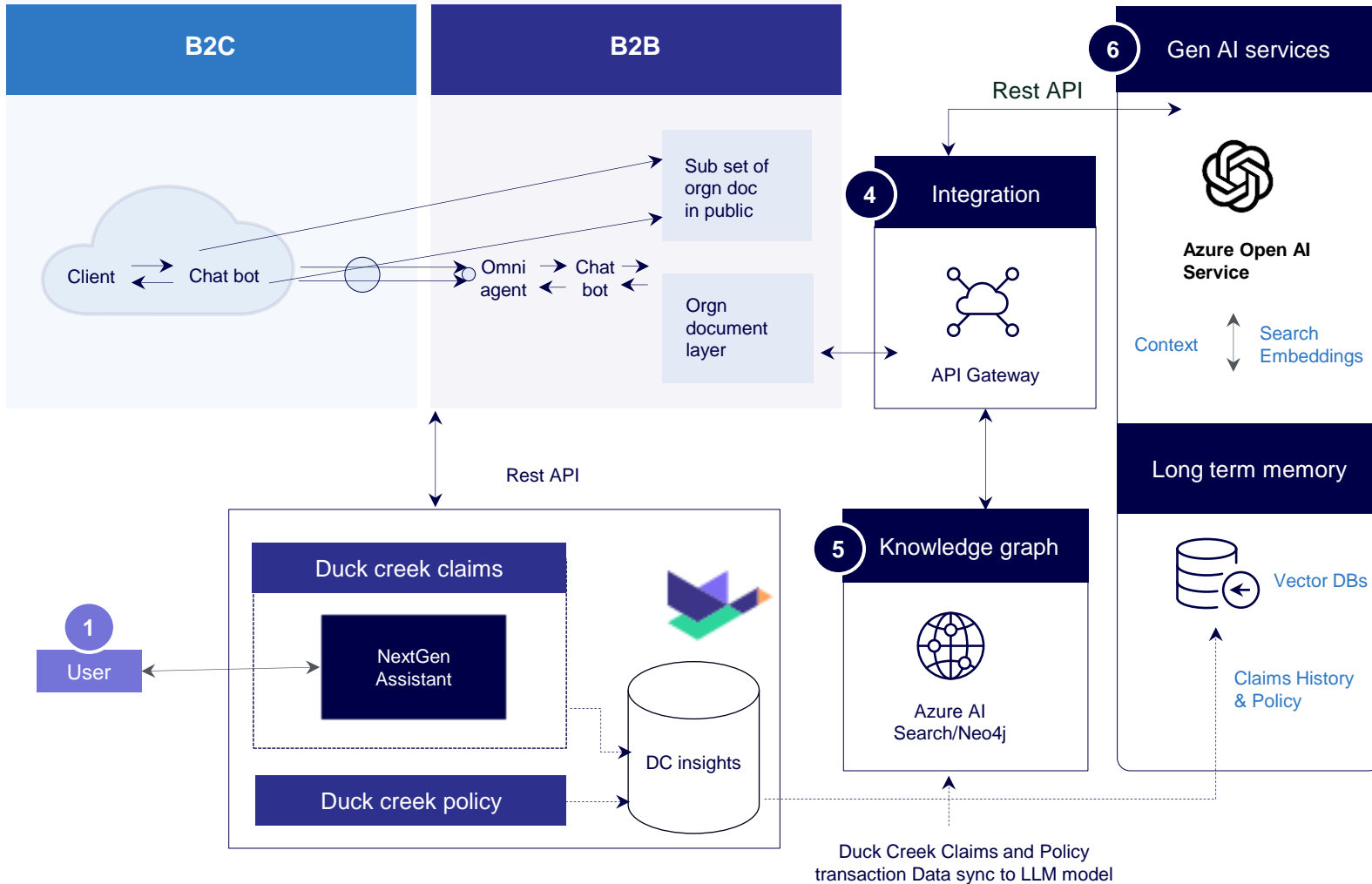
Contextualized claim summary

Custom Copilot enables accelerated customer services powered by generative AI. This automation inserted directly in the engagement with customers, increases satisfaction and reduces abandonment.



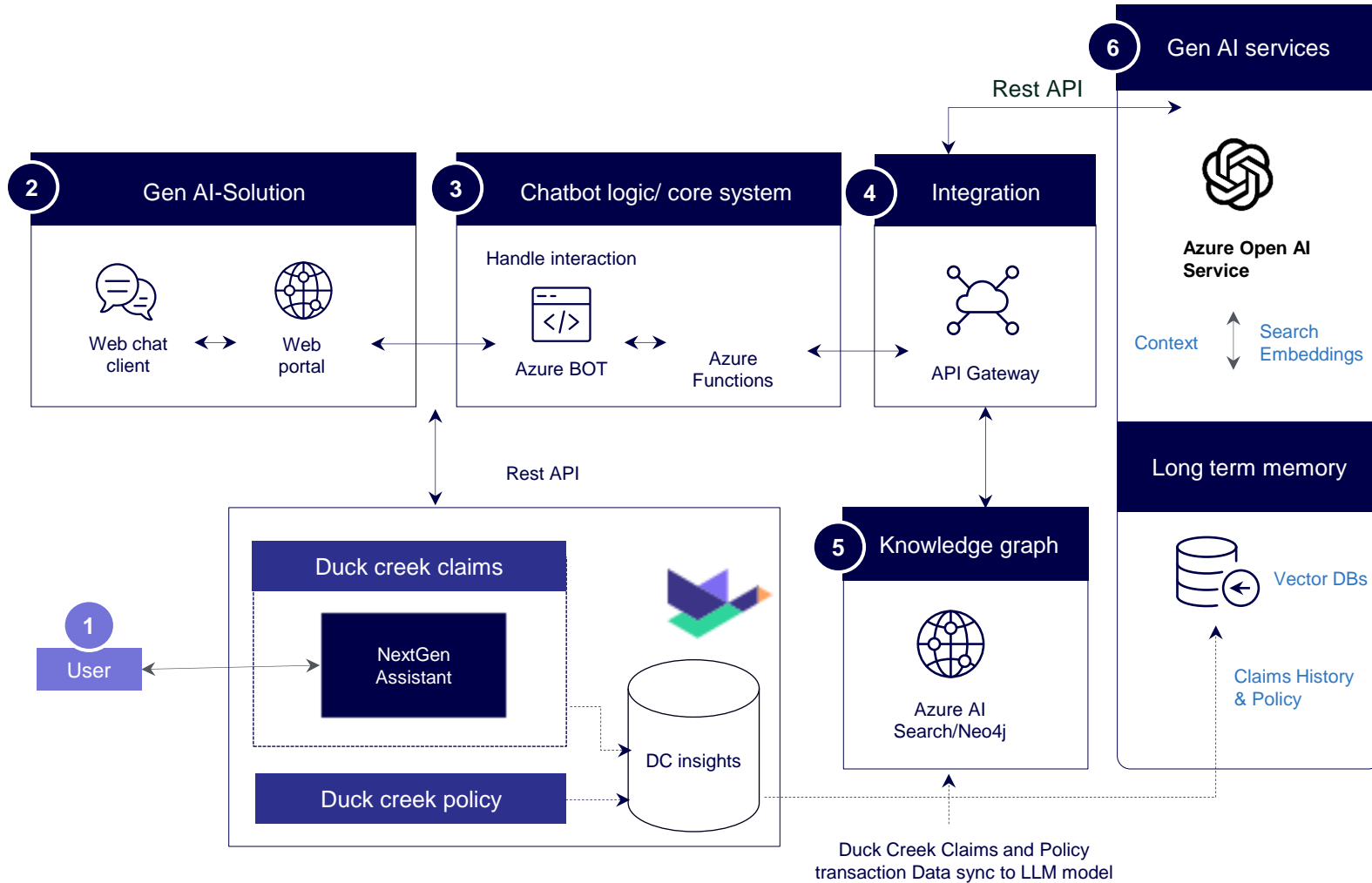
Appendix

Technology used – architecture blueprint



1. User initiates the interaction using Chatbot UI from Duck Creek Claims
2. User Interface: Website is hosted in Azure, Webchat client embedded. SSL/TLS certificate for encrypted connection. Webchat client communicates with BOT service through direct line asynchronously.
3. Chatbot Logic: Define conversational logic in Azure BOT & integrate with Azure Open AI and enterprise REST APIs with Azure functions.
4. Integration: Both internal & external API calls will be handled by API Gateway. This is scalable, reliable & provide security.
5. Neo4J is a fully managed graph database service. Graph databases are optimized to store and query the relationships between entities.
6. Azure Open AI Service for GPT 3.5 LLM to generate responses in the context to vectorized long term memory on claim history.

Technology used – architecture blueprint

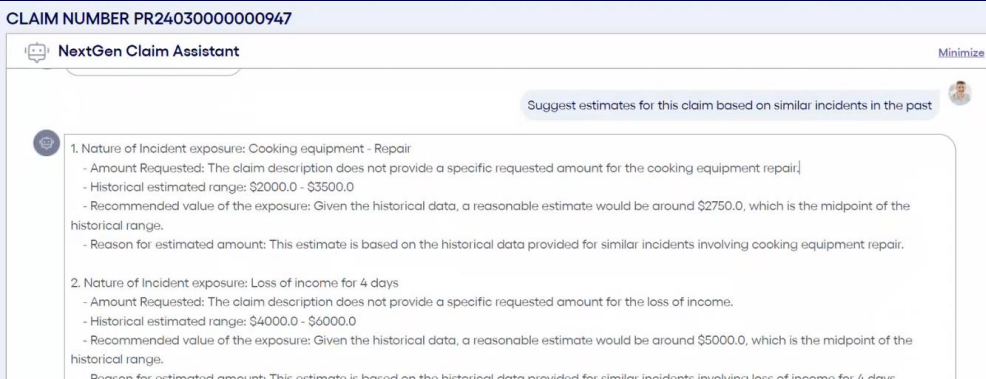


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Key capabilities (2/4)

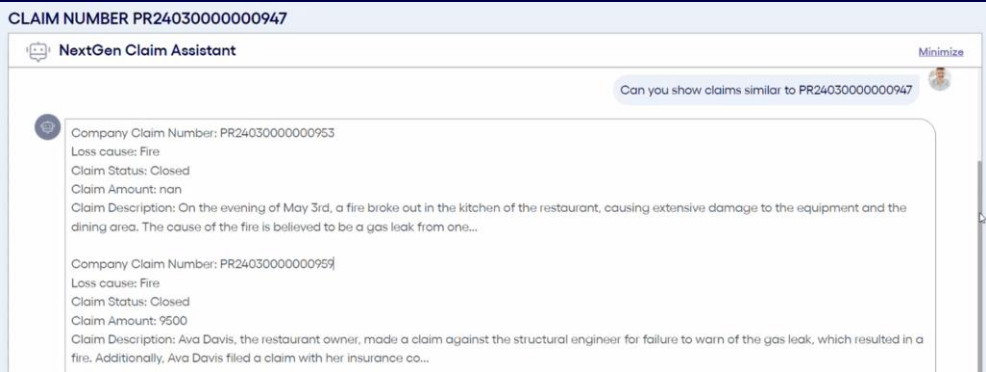
Estimate recommendation

John must now enter estimates for this claim. Though he is clear on the exposures, he is not so confident with the reserve figures. He decides to check with the Gen AI assistant prompting it to look at similar claims in the past.



Generate summary of file notes

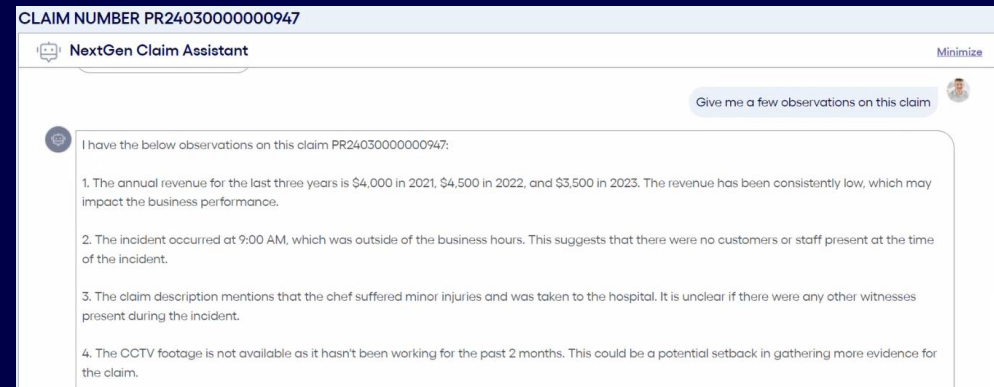
John wants to see similar claims and understand the status of it along with the assessment report and claim payouts. He needs the Gen AI assistant to bring him similar claims with necessary data to help him assess better



Key capabilities (3/4)

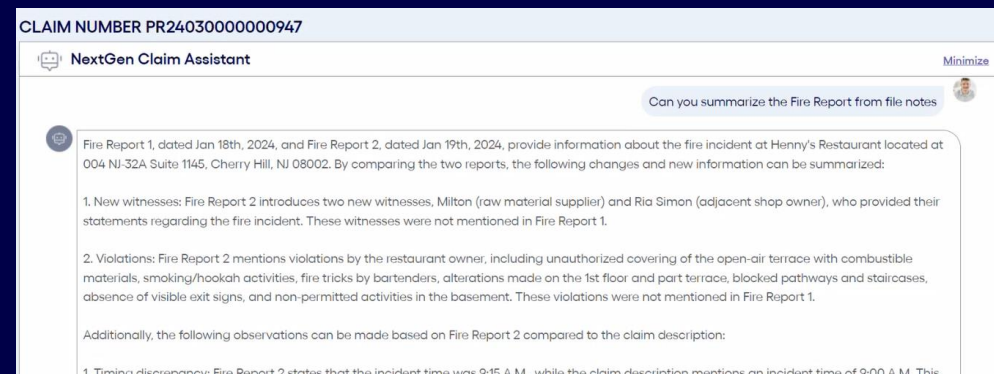
Identify key discrepancies

Claim adjustor, John somehow feels something is not right in this claim. It could be just his gut feel. He wants to see if the Gen AI assistant could bring him any observations in this regard, so that he can validate them.



Generate summary of file notes

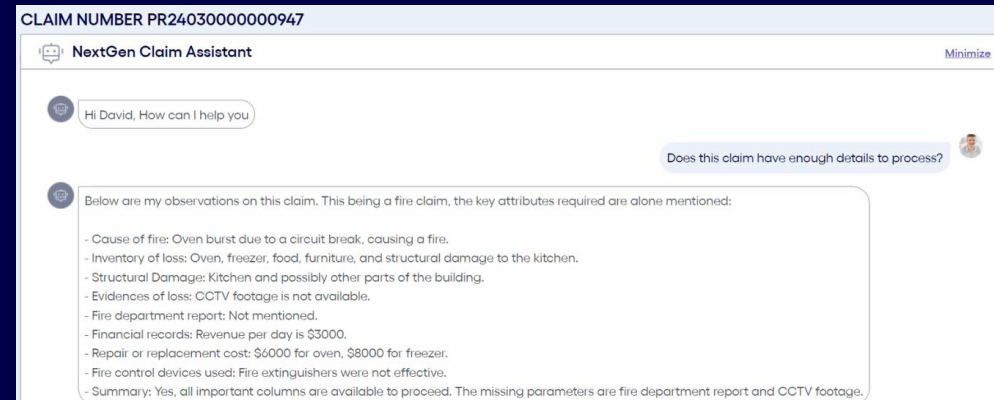
Fire reports are received and stored in the file notes. The report seem to be quite detailed with 10-15 pages. John wants the Gen AI assistant to summarize the report to him with key observations.



Key capabilities (4/4)

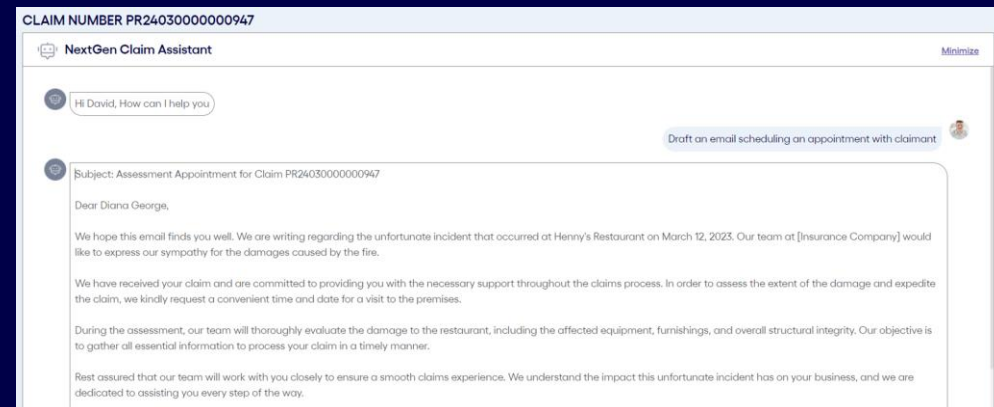
Identification of missing information

This being a fire claim, he needs to cross check the critical data that needs to be looked at. He is expected to send a note to his Ops team to do the follow-up, but he needs to mention what he needs further to assess. He reaches out to the Gen AI assistant to help him with missing data insights



Generate contextualized emails

John wants to send next steps email to the claimant. He doesn't have the time to draft email. He decides to leverage the Gen AI assistant to draft an email for him.



Thank you

