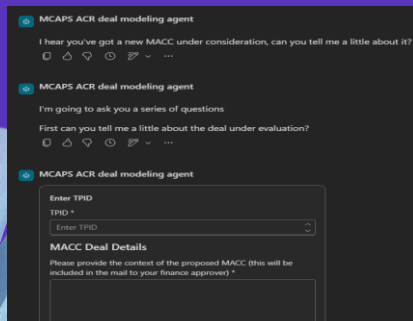


Customer Opportunity Agent

Solution Overview

Internal AI-driven assistant developed to streamline how Azure Consumption Commitment sales opportunities are evaluated during negotiations. In essence, it collects key deal inputs from sellers, automates the financial modelling, initiate approval workflow with standardized analysis for Finance & Sales management to review – all in seconds accelerating deal cycles and improving decision quality. The solution was built using Microsoft's Copilot Studio alongside Power Platform tools. The agent triggers:

- Data Validation in a consistent way for all deals & Storage on SharePoint
- Query Relevant Baseline Data via Fabric and DAX
- Excel Modelling with Office Scripts
- Results Packaging / email using office Script
- Auto routing and notification



Business Use Case

As MACC penetration increases, ACR growth becomes more constrained by multi year contracts making annual budget attainment a challenge. It is therefore essential that we sign MACC that supports our ACR ambition. There is no current standard methodology for MACC proposal evaluation in the field. Field finance review of proposed deals is also constrained by availability, especially during CFO or budget cycles, and the business always needs feedback quickly regarding sometimes multi scenario situations. Strong business partnership can result in healthier deals, and builds a stronger muscle for early-stage negotiations

Benefits

- **Speed to Value:** Case evaluation reduced from hours to minutes. France has 50-60 cases per year
- **Inconsistency & error risk:** Decentralized spreadsheets and manual processes led to inconsistent assumptions, multiple iterations, and higher risk of errors.
- **Capacity bottlenecks:** Dependence on a limited pool of finance managers created delays, increasing the risk of rushed or suboptimal decisions.
- **Missed strategic optimization:** Focus on time-pressured number crunching limited the ability to optimize deal structure and portfolio management.

Key Results

300 hours

Annual time savings

50%

Expected capacity to partner with business

Technology

- Copilot Studio
- Power BI
- Power Automate
- Azure AI
- Azure Analytics
- Azure Identity

Time taken

Launched in 1 month